

Clarity in Retirement Living - Empowering Your Decisions

Your Retirement Village Checklist



There's a lot to think about when considering if a Retirement Village Lifestyle is right for you. To help you make confident, informed choices, we have devised a list of questions so you can explore your options and discuss with family, advisors, and retirement village representatives.

Research & Tours

- Have you toured the village? Y/N
- Have you attended open days? Y/N
- Have you spoken to current residents? Y/N
- Have you reviewed brochures and promotional materials? Y/N
- Do you understand the lifestyle and community offered? Y/N

Legal Agreement Review

- Have you reviewed the Retirement Village Agreement? Y/N
- Do you understand your rights and obligations? Y/N

Financial Planning

- Do you understand all upfront costs (holding deposit, further deposit, balance)? Y/N
- Are you aware of ongoing service and management fees? Y/N
- Have you factored in utility charges? Y/N
- Do you have sufficient funds to finance the ongoing contribution? Y/N
- Have you considered the costs of selling your current home? Y/N
- Are you aware of exit fees (deferred fee, reinstatement/refurbishment costs, etc.)? Y/N
- Do you understand the potential for capital gains and losses? Y/N
- What happens if you are not happy in the Village and want to leave in the first year, does the Village offer a "change of mind money back guarantee"? Y/N

Future Care Needs

- Have you considered what happens if you or your partner needs higher care? Y/N
- The village offers or is linked to an aged care facility? Y/N
- How will transitions to higher care be handled?
- Can couples remain close if one partner's care needs change? Y/N

Family Involvement

- Have you involved your family in the decision-making process? Y/N
- Do they understand your rights and obligations? Y/N
- Are they aware of the costs and fees applicable? Y/N
- Will they be prepared to deal with the village if you lose capacity or pass away? Y/N

Our property team has extensive experience supporting clients through every aspect of retirement village and aged care facility transactions.

Retirement Living Legal Services

We offer guidance and practical assistance with:

- Purchasing or leasing premises in a retirement village or aged care facilities
- Reviewing and advising on Residence & Management Agreements
- Advising on aged care agreements
- Preparing loan documents for Refundable Accommodation Deposits (RADs) and other financing needs

We also provide comprehensive Wills & Estate Planning services, including:

- Preparing or updating your Will
- Drafting Enduring Powers of Attorney and guardianship documentation
- Preparing Appointments of Medical Treatment Decision Makers

Our goal is to make your transition to retirement living as seamless and stress-free as possible. If you need additional support, our team is here to help.

If you have questions about Retirement Villages or want to learn how our property team can help, please contact our office on +61 3 9822 8588.



Kristy Muhlhan



Kate Smith



Sandra Le



Emma Dickens