

The Breeze

POINT LONSDALE

Factsheet

Version 14
November 2024



sencia

Factsheet for loan-licence or loan-lease retirement village

Under the *Retirement Villages Act 1986*, all retirement villages operating in Victoria must give this factsheet to a retiree (or anyone acting on their behalf) within seven days of a request and include it in any marketing material provided to them and intended to promote a particular village.

Make sure you read and understand each section of this document before you sign a contract to live in this village.

Consumer Affairs Victoria suggests that before you decide whether to live in a retirement village, you should:

- seek independent advice about the retirement village contract – there are different types of contracts, and they can be complex.
- find out the financial commitments involved – in particular, you should understand and consider entry costs, ongoing charges, and financial liabilities on permanent departure (covered in sections 9 and 10 of this document).
- consider what questions to ask the village manager before signing a contract.
- consider whether retirement village living provides the lifestyle that is right for you.
- review the *Guide to choosing and living in a retirement village*.

The Guide and other general information about retirement living is available on Consumer Affairs Victoria's website at:

www.consumer.vic.gov.au/housing/retirement-villages

All amounts in this factsheet are GST-inclusive, unless stated otherwise where that is permitted by law.

1. Location

Name and address of retirement village:	The Breeze, 55 Saltbush Circuit, Point Lonsdale, Victoria 3225
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2. Ownership

2.1 Name and address of the owner of the land on which the retirement village facilities are located (company /organisation/owners corporation):	Sencia Holdings Pty Ltd ACN 615 957 509, 346 South Road, Hampton East Victoria 3188 which is referred to as 'the owner' in this factsheet.
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2.2 Year construction started:	2018
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3. Management

3.1	<ul style="list-style-type: none">Name of company or organisation that manages the retirement village:ABN:Address:Telephone number:Date company or organisation became manager:	<p>Sencia Management Pty Ltd ACN 625 452 119 which is referred to as 'the manager' in this factsheet</p> <p>72 625 452 119</p> <p>346 South Road, Hampton East, Victoria 3188</p> <p>03 9559 9100</p> <p>2018</p>
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3.2	Is there an onsite representative of the manager available for residents?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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If yes, the onsite representative is available on these days:	Monday to Friday 9:00am to 5:00pm
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4. Nature of ownership or tenure

Resident ownership or tenure of the units in the village is:	<ul style="list-style-type: none">Lease (non-owner resident)
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5. Number and size of residential options

5.1	Number of units by accommodation type:	<ul style="list-style-type: none">• 100 two-bedroom units• 58 three-bedroom units• 12 apartments• 170 in total
5.2	Garages, carports, or carparks:	<div><input checked="" type="checkbox"/> Each unit has its own garage or carport. <input checked="" type="checkbox"/> attached to the unit, with internal access to the residence. <input type="checkbox"/></div> <div><input checked="" type="checkbox"/> General car parking is available in the village for visitors.</div> <div><input checked="" type="checkbox"/> Other (<i>specify</i>): The 12 apartments have one car park each in a carport to the north of the Waterside Pavilion.</div>

6. Planning and development

Has planning permission been granted for further development of the village?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Note: See the notice at the end of this factsheet regarding inspection of the permission document.	

7. Facilities onsite at the village

7.1 The following facilities are available to residents as at the date of this statement.

Note: If the cost for any facility is not funded from the recurrent service charge paid by residents or there are any restrictions on access, a list is attached with the details.

- | | | |
|---------------------|---------------------------------|--|
| • Community Centre | • Sun lounge | • Swimming pool and spa shelf (indoor, heated) |
| • BBQ area outdoors | • Art studio | • Separate lounge in community centre |
| • Billiard's area | • Dining area | • Change rooms. |
| • Workshop | • Private dining rooms | • Garden beds and citrus grove |
| • Cinema | • Hairdressing and beauty salon | • Medical consultation rooms |
| • Dance floor | • Library and meeting room | • Bowling green |
| • Glass Pavilion | • Village bus | |
| • Drying room | | |
| • Gymnasium | | |

7.2 Does the village have an onsite or attached residential or aged care facility? ☒ Yes ☐ No Arcare Pty Ltd is a related entity of Sencia Holdings Pty Ltd and operates Arcare Point Lonsdale, 5 Knowles Grove, Point Lonsdale – 450m from The Breeze.

Note: The retirement village owner or manager cannot keep places free for residents. To enter a residential or aged care facility, you must be assessed as eligible through an aged care assessment in accordance with the Commonwealth *Aged Care Act 1997*.

8. Services

- 8.1 Services provided to all village residents (funded from the recurrent service charge paid by residents):
- Cleaning and maintenance of communal areas and facilities
 - Maintenance and care of communal lawns and gardens
 - Management and administration services
 - Payment of rates, taxes and charges for communal areas and community facilities
 - Building and public liability insurances
 - Garbage and waste collection
 - Emergency system monitoring 24/7
 - Administration and reception services

- Newspapers in the library
- Staff costs
- Regulatory compliance costs
- Maintenance and running costs of the village bus and golf cart.
- Preparation and auditing of financial statements
- IT software and hardware costs, Foxtel in Waterside Pavilion, and other data charges
- Other services funded via the service fees from time to time.

8.2 Are optional services provided or made available to residents on a user-pays basis?

☒ Yes ☐ No

There are a range of optional services available on a fee-for-service basis including:

- Visiting health professionals in the consulting suites
- Hairdressing and beauty treatments in the hair and beauty salon
- Activities, events, and day tours
- Meals at events

Further personal and clinical services can be coordinated by Sencia staff upon request.

9. Entry costs and departure entitlement

9.1 The resident must pay: a refundable in-going contribution

9.2 If the resident must pay a refundable in-going contribution:

the range is: \$600,000 to \$1,250,000

It is refunded: At the earliest of:

- 14 days of the next resident taking possession of the unit; or
- 14 days of receipt of the next in-going contribution (referred to in the Residence and Management Contract as the 'New Entry Payment'); and
- 18 months after the termination of the Residence and Management Contract.

9.3 If the resident must pay a refundable in-going contribution, is a fee deducted at permanent departure?

☒ Yes ☐ No

If yes, the departure fee is based on:

The departure fee is calculated:

- A. in respect of the time commencing on the earlier of the date the resident commences occupation of the unit and the commencement date of the Residence and Management Contract (the Contract) and ending on the earlier of the date the owner receives the resale price from a New Resident (referred to as the New Entry Payment in the Contract) and the Exit Entitlement Date.
- B. on the greatest of the New Entry Payment, the Entry Payment, and the resale value (the resale value is referred to as the Proxy Amount in the Contract); and
- C. at the rate of 4% per year for the period referred to in (a) up to a maximum of 8 years, calculated on the amount referred to in (b) and on a pro rata daily basis for a part year. The maximum departure fee percentage is 32%.

9.4	These costs must be paid by the resident on permanent departure, or are deducted from the refundable in-going contribution:	<ul style="list-style-type: none"> • The departure fee is described above. • Any Capital Loss (see 12 below). • The costs of repairing or replacing anything in the retirement village (including the residence) that the resident or their invitee has deliberately or recklessly damaged or destroyed. • Any amounts the owner has paid to the resident or on the resident's behalf under regulation 7 of the <i>Retirement Villages (Contractual Arrangements) Regulations 2017</i> (Vic) • Any other amounts the resident owes under the Residence and Management Contract or any other agreements the owner or the manager or their related parties have with the resident about the provision of services or goods to the resident in the retirement village.
9.5	The estimated sale price ranges for all classes of units in the village as of November 2024 are:	<ul style="list-style-type: none"> • 2-bedroom unit: \$680,000 to \$850,000 • 3-bedroom unit: \$785,000 to \$1,250,000 • 12 apartments: \$600,000 to \$825,000 <p>These prices relate to the current release of villas and apartments. Prices may increase over time.</p>

10. Ongoing charges

10.1 The current rates of ongoing charges for new residents:		
Type of unit	Service charge	Long term maintenance fund charge
Self-contained unit and apartment:	<ul style="list-style-type: none"> • \$396.55 per month For FY 2024	<ul style="list-style-type: none"> • \$45 per month For FY 2024

11. Financial management of the village

11.1 The village operating surplus or deficit for the last financial year is: \$25,008 / deficit

11.2 Does the village have a long-term maintenance fund? ☒ Yes ☐ No

The balance of the maintenance fund at the end of last financial year was \$243,028

12. Capital gains or losses

If the unit is sold, does the resident share in any capital gain or loss on the resale of their unit? ☒ Yes ☐ No

If yes, the resident's share in any capital gain or loss is calculated using this formula:

Capital Gain: The resident will receive the amount (if any) by which the New Entry Payment exceeds the Entry Payment paid by the resident.
Capital Loss: The resident must pay the amount (if any) by which the Entry Payment paid by the resident exceeds the New Entry Payment.

13. Reinstatement or renovation of the unit

Is the resident responsible for reinstatement or renovation of the unit on permanent departure? ☒ Yes ☐ No

If yes, the resident must pay for: repairing any damage or accelerated wear and tear the resident or their invitee has caused to the residence

14. Insurance

14.1	Is the village owner or manager responsible for arranging any insurance cover for the village?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	If yes, the village owner or manager is responsible for these insurance policies:	Building replacement, public liability, professional indemnity
14.2	Is the resident responsible for arranging any insurance cover?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	If yes, the resident is responsible for these insurance policies:	Contents, car and motorised scooters, public liability, workers' compensation for people doing work for the resident in the residence

15. Security

Does the village have a security system?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
If yes:	
• the security system details are:	Recorded CCTV monitored emergency alarm in residences and Waterside Pavilion (Tunstall), locked community gates at night.
• the security system is monitored between:	The emergency call system is always monitored.

16. Emergency system

Does the village have an emergency help system?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
If yes:	
• the emergency help system details are:	Tunstall
• the emergency help system is monitored between:	At all times.

17. Resident restrictions

17.1	Are residents allowed to keep pets? If yes, any restrictions or conditions on pet ownership are available on request.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (But not cats due to council regulations)
17.2	Are there restrictions on residents' car parking in the village? If yes, details of parking restrictions are available on request.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Residents should not use visitor parking.
17.3	Are there any restrictions on visitors' car parking in the village? If yes, details of parking restrictions are available on request.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No parking on streets in front of villas

18. Accreditation

Is the village accredited:	
• under the Lifemark Village Scheme (administered by The British Standards Institution and initiated by the Property Council of Australia)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
• by the Australian Retirement Village Association?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
• under the International Retirement Community Accreditation Scheme (administered by Quality Innovation Performance and initiated by Leading Age Services Australia)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
The Breeze is committed to upholding a high standard of retirement living by complying with the Property Council of Australia Retirement Living Code of Conduct.	

19. Resident input

Does the village have a residents committee established under the *Retirement Villages Act 1986*?

☒ Yes ☐ No

20. Waiting list

Does the village have a waiting list for entry?

☒ Yes ☐ No

The following documents are in the possession or control of the owner or manager and can be inspected free of charge within seven days of a request (by law).

- ☒ Village site plan
- ☒ The statutory statements and report presented to the previous annual meeting of the retirement village.
- ☒ Statements of the balance of any capital works, capital replacement or maintenance fund at the end of the previous three financial years of the retirement village
- ☒ Examples of contracts that residents may have to enter.
- ☒ Planning permission for any further development of the village
- ☒ Village dispute resolution documents

Declaration: The information in this factsheet is correct as of November 2024