

Questions to Ask on a Retirement Village Tour

Bring this checklist with you to every village you visit. Asking the same questions at each one makes it far easier to compare your options fairly and make a confident decision.

VILLAGE NAME

TOUR DATE

SALES MANAGER

How to use this checklist: Tick each box as your question is answered to your satisfaction. Use the notes lines at the end of each section to jot down specific figures, names, or follow-up questions. A village confident in what it offers will be happy to answer every question on this list, clearly and without pressure.

1 DAILY LIVING & COMMUNITY

- What does a typical weekly activities calendar look like?
- Can I speak to current residents without a staff member present?
- Is communal dining available, and can I try it during my visit?
- What security and emergency call systems are in place?
- Are pets welcome, and are there any restrictions?
- Can family stay overnight, and are there restrictions on visitors?
- What floor plans are available, and how do storage and natural light compare across unit types?

2 FINANCIAL & CONTRACT TERMS

- What is the exact entry payment for the home I am considering, and what does it include?
- Is the weekly fee fixed for life, CPI-linked, or variable at the operator's discretion?
- Does the weekly fee include interior maintenance, or only exterior and grounds?
- What is the Deferred Management Fee percentage and the maximum cap?
- Are there any additional exit costs beyond the DMF?
- Is there a money-back guarantee period, and what conditions apply?
- What is the typical timeframe for resale and refund after I leave?
- Do I share in any capital gain, or am I exposed to capital loss?
- Is the village registered with the Companies Office, and who is the Statutory Supervisor?
- Will I be required to get independent legal advice before signing?

Tip: Visit at different times of day, and try to spend some time in the communal spaces independently of the formal tour. The atmosphere you sense outside the sales appointment is often the most honest indicator of what daily life is really like.

NOTES

