



**Tamahere
Eventide**

An outreach of the Methodist
Church of New Zealand

Atawhai Assisi Retirement Village

The village is owned and operated by Tamahere Eventide Home Trust, a registered charitable entity, with Trustees appointed by the Methodist Church.

2 and 3 Bed Room Villas ranging in price from \$700,000 to \$825,000

Architecturally designed

The Village was architecturally designed to achieve a sense of balance, elegance & community. The architecture is solid and well proportioned in a classic style. The interior reflects an ambience of peacefulness and light.

The grounds and plantings are designed to create a private and sun filled garden areas. All villas are designed with a high level of insulation, including double glazing, and to maximise the warmth of the sun.

Villas includes:

Heat pump in lounge and main bed room for heating and cooling, fitted carpet to living/bedroom areas, double glazing, two tiled bathrooms with under floor heating (one setup for disabilities), laminate flooring in kitchen, smoke detectors, modern light fittings, drapes, blinds in the kitchen, emergency call system, Bosch appliances (oven, induction cook top & range hood), dishwasher and washer/dryer, automatic garage door opener, telephone, internet and TV satellite dish & aerial system.

Active living

When you want to be involved there are plenty of opportunity to enjoy new experiences and companionship. At the same time you will be able to live privately and independently. Friendly and caring staff will be available when required to provide support and assistance.

Occupation Right Agreement

Your right to live in the village is under an Occupation Right Agreement

An Occupational Right Agreement gives you the right to live in a villa and enjoy all the services and amenities of the Village, subject to you complying with the terms of the Agreement, including making payment of an agreement fee before moving into the villa.

You must also pay a weekly fee for village outgoing. The fee is discussed in more detail below.

On termination of the Occupation Right Agreement a village contribution is payable.

The Village contribution is calculated at 4% per annum over the first five years of the occupancy of the unit. This Village contribution (also known as the Management Fee) is capped at 20% of the

agreement fee paid for by an incoming resident for an occupation right agreement for the unit. The process is for a valuation to be obtained to determine the capital sum to be paid by an incoming resident.

The cost of refurbishing your villa when your Occupation Right Agreement ends, is payable by you at the end of your occupancy of the villa. You are not liable for fair wear and tear.

Prior to entering into an Occupation Right Agreement you will receive the following documents:

- Disclosure Statement
- Occupational Right Agreement
- Code of Residents Rights
- Code of Practice.

Professional advice

You are required to get independent legal advice before you enter in an Occupation Right Agreement. A lawyer must explain the Occupation Right Agreement and its implications, and certify that this has been completed. This is a requirement of the Retirement Villages Act 2003.

For a unit that **has been** built, you will be given a 15 day cooling off period should you change your mind.

For a unit **to be** built, if the unit is not completed within 6 months after the proposed completion date you can cancel the occupation right agreement by giving notice at any time after that 6 month period. You do not have to give a reason if you cancel the occupation right agreement under either option. If you have paid a deposit this will be returned to you by the Statutory Supervisor with any interest. If you have moved into the unit and received services, you must pay for any services received.

Statutory Supervisor

Covenant Trustee Services Limited is appointed as the Statutory Supervisor of the Village. The Statutory Supervisor is an independent organisation or person that monitors the Village's financial position and operation. The Statutory Supervisor is one of the people whom residents can go to about complaints should one arise.

To protect residents' interest a Deed of Encumbrance is registered in favour of the Statutory Supervisor, under the Retirement Villages Act 2003, over the land on which the village is situated.

Weekly fee

This fee covers Village outgoings such as rates & water, insurance, security, gardening, lawn mowing, exterior maintenance, 24 hour emergency call facility and other operating costs. Weekly fees are reviewed annually.

You will be required to pay for your electricity, content insurance and SKY in addition to your normal household and personal expenses.

Intending residency

An application for an Occupation Right Agreement must be completed. Please inform us should you have a house to sell. Alternative arrangements can usually be made.

Other on site benefits and amenities:

Attractive landscaped grounds of the Atawhai Assisi Home complex. Chapel facility for church services and weekly visit by a staff member.

User pay services: Meals and milk & bread (delivered to your villa), emergency nurse response, personal trainer, day care service, respite care, hairdresser, podiatrist, transport and maintenance service.

Frequently asked questions

1. Can I participate in capital gain?

Yes, the villa is valued by a registered valuer and a new Occupation Right Agreement will be sold at market value. If there has been an increase in value the outgoing resident will receive the benefit of this increase less the village contribution to be deducted on termination.

2. Who will sell my villa?

We will market and sell the villa on your behalf after agreeing with you on the selling price and providing you with a draft settlement statement. You will be kept informed throughout the process.

3. Will the weekly fee cease on termination?

The weekly fee will stop on date of settlement of the villa by the new owner. Should this take longer than 6 months your fee will be reduced to 50%.

4. Can the Village get into financial difficulty?

Yes, Villages can get into financial difficulty, but the role of the Statutory Supervisor is intended to minimise this risk. Tamahere Eventide Home Trust has borrowed funds to complete the development of the Village. A mortgage security in favour of Christian Savings Limited is registered on the land owned by the Trust and on which the Village is being constructed. Covenant Trustees Services Limited, as the Statutory Supervisor, has a registered encumbrance on the Village Land and a deed of priority has been entered into between the Statutory Supervisor, Christian Savings Limited and the Trust. The Deed of Priority provides, amongst other things, that Christian Savings' interests are subject to the residents' rights under the occupation right agreement as well as rights the Statutory Supervisor may enforce for the benefit of the residents. Such rights include the ability of the Statutory Supervisor to step in and direct the Trust to manage and operate the Village in a specified way and to make court applications to protect the residents' rights and interests, if necessary. Should a retirement village operator get into financial difficulty and a receiver or liquidator be appointed, the Statutory Supervisor will represent the residents' interests under any such process.

5. Can I move within the Village

Yes, you can transfer to another villa subject to the conditions as contained in the Occupational Right Agreement

6. Is there a maintenance or sinking fund?

There is a long term maintenance plan and a maintenance fund. This is for maintenance, refurbishment and capital replacement works. The funds are kept in a separate investment and interest is accrued.

7. Can I have input in the running of the Village?

Currently the Board of Trustees includes one member from the Village. There is also a Village committee which holds regular meetings and liaise with the Village Manager on the smooth running of activities and needs of the residents.

8. How do I make a complaint?

The Village has a written complaints procedure with contact details of whom you should contact if you wish to make a complaint. We ask that any complaints be reported to the village manager. Efforts will be made to resolve the complaint informally. If this is not possible or if the resident wishes, the complaint can be referred directly to the Trust's complaints facility and the resident has the option of requesting a meeting of the village's resident's committee, with the operator and/or the statutory supervisor. Other parties which may assist a resident is the Registrar of Retirement Villages and the Retirement Commissioner.

9. Can I lease or rent out my Villa?

No. The villa is for use of the resident(s) named in the Occupational Right Agreement.

10. Can my friends and family visit and stay?

Yes. Friends and family can stay and are able to enjoy all the facilities we offer whilst visiting or staying in your Villa. All guests must comply to the village rule of an aggregate total for all guests of 90 days in any period of 12 months.

11. Can I bring a pet?

Yes. Subject to the approval of the village manager you are permitted to have a small dog, bird or a cat.

12. Can I have a garden?

Yes and you may bring your favourite plants to enhance your garden. Allotments will be available for growing your own vegetables. This is done in co-operation with the village manager.

13. Can I make alterations to my Villa?

Any additions or alterations need the approval of the Village Manager.

14. What security is available?

All villas include an emergency call system which is monitored 24 hours by the Nurse on Duty and there are regular security patrols.

15. General Information

- Mail

Mail is received and cleared each morning (excluding Sunday and Public Holidays) at the rest home reception by Rural Delivery. There it gets sorted and then distributed to each villa. Outgoing mail can be placed in the mailbox situated on the wall adjacent to the reception desk. Newspapers are delivered to reception (i.e. NZ Herald or Waikato Times) and then delivered to each subscriber.

- Refuse collection

Refuse will be collected weekly.

- Hairdresser

A hairdresser visits the rest home three days per week. The salon is situated in the main building.

- Podiatrist

Appointments with our visiting podiatrist can be arranged.

- Activities

A weekly activities program is distributed to each villa at the start of each week to advise you of upcoming entertainment. Regular entertainment is provided by a variety of individuals and groups.

- Church services

Church Services are held each Sunday in the Chapel as well as communion services.

- Social Activities

Happy hour is held once a month. Potluck lunches take place. Visits to interesting places, cafes and operatic society concerts take place on a regular basis. Movies are shown every second week.

- Meals, milk & bread

Meals can be ordered 7 days a week (main meal served at midday) by phoning the kitchen before 9.00 am or you may prefer to have a regular standing order. Milk and bread can be delivered at lunch time or you may prefer to walk across to collect your own as needed. These items will be charged to your account the end of each month.

- Transport

Our van is also available for transport to personal appointments. A telephone call can be made to the Receptionist who will help you make your arrangements.

- Shopping

A weekly shopping trip to the Hillcrest New World shopping centre for groceries is available. A stationery and post shop are part of this complex. On a fortnightly basis, a trip to Westfield – Chartwell is undertaken.

A range of non-perishable items is available at the rest home reception. Toiletries, stamps, cards, sweets and biscuits are some of the items in stock.

- *General Practitioner*

Transport can be arranged for visits to the GP.

- Other Services available

- Rest Home Care
- Hospital
- Respite Care
- Daycare
- Catering

Kindly be aware that the above may have further terms and conditions that apply which you will find in the Disclosure Statement and Occupational Right Agreement.

Selling Prices

Villa number	sqm	Duplex/Single	bedrooms	Bathrooms	Diningroom	Separate Lau	Garages	Selling Price
1	134.2	s	2	2	1	1	1	\$ 770,000
2	131.6	d	2	2	1	1	1	\$ 745,000
3	131.6	d	3	2		1	1	\$ 745,000
4	154	s	2	2	1	1	2	\$ 800,000
5	134.3	d	3	2		1	1	\$ 760,000
6	134.3	d	3	2		1	1	\$ 760,000
7	117.5	d	2	2		1	1	\$ 700,000
8	134.3	d	3	2		1	1	\$ 760,000
9	126.5	d	2	2		1	1	\$ 740,000
10	126.5	d	2	2		1	1	\$ 740,000
11	127.5	d	2	2		1	1	\$ 740,000
12	127.5	d	2	2		1	1	\$ 740,000
13	147.4	s	2	2	1	1	2	\$ 785,000
14	134.3	d	3	2		1	1	\$ 760,000
15	134.3	d	3	2		1	1	\$ 760,000
16	126.5	d	2	2		1	1	\$ 740,000
17	126.5	d	2	2		1	1	\$ 740,000

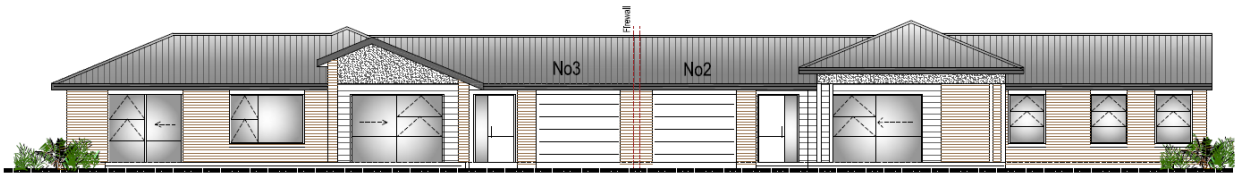
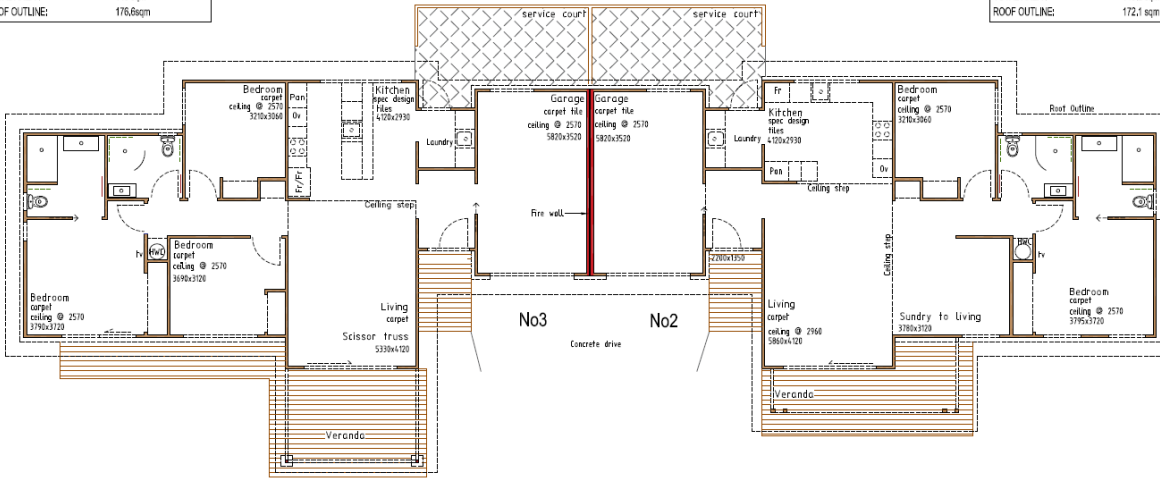
Under construction – completion 30 June 2023

Villa number	sqm	Duplex/Single	bedrooms	Bathrooms	Diningroom	Separate Laur	Garages	Selling Price
18	140.5	s	2	2	1	1	1	\$ 780,000
19	140.5	d	2	2	1	1	1	\$ 780,000
20	130.8	d	3	2		1	1	\$ 760,000
21	130.8	s	2	2	1	1	2	\$ 760,000
22	130.8	d	3	2		1	1	\$ 760,000
23	130.8	d	3	2		1	1	\$ 760,000
24	130.8	d	2	2		1	1	\$ 760,000
25	130.8	d	3	2		1	1	\$ 760,000

Sample Plans

TOTAL GROUND FLOOR AREA: 131.6 sqm (Over Framing)
 TOTAL GROUND FLOOR AREA: 134.8 sqm (Over Cadding)
 COVERED AREA: 13.2sqm
 TOTAL AREA: 148 sqm
 ROOF OUTLINE: 176.6sqm

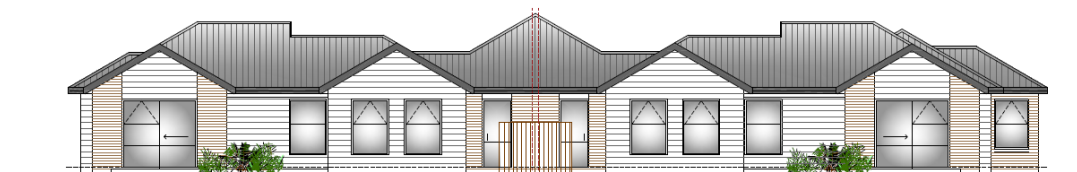
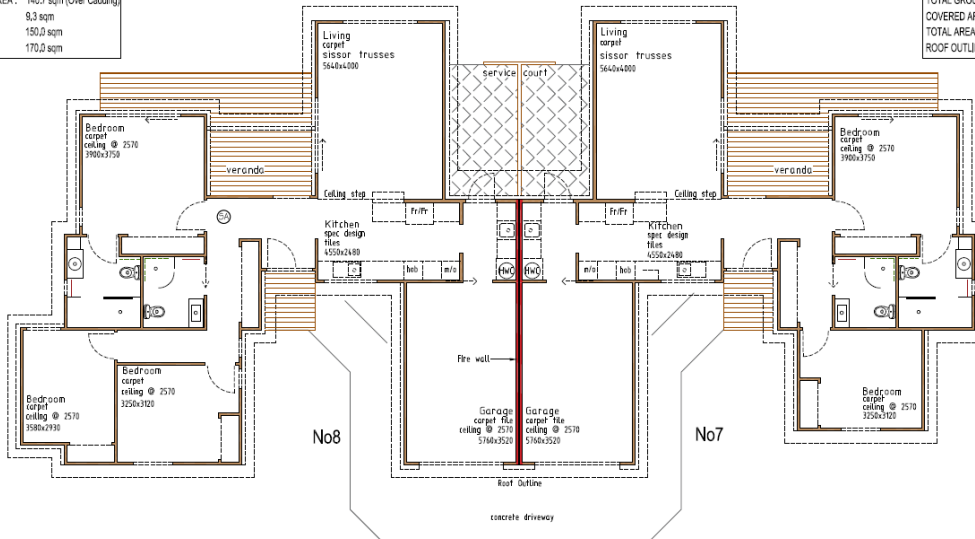
TOTAL GROUND FLOOR AREA: 131.6 sqm (Over Framing)
 TOTAL GROUND FLOOR AREA: 135 sqm (Over Cadding)
 COVERED AREA: 10.3sqm
 TOTAL AREA: 145.2 sqm
 ROOF OUTLINE: 172.1 sqm



**ATAWHAI ASSISI
 HOME & HOSPITAL
 VILLAGE HOUSES - HOUSE 2 & 3**

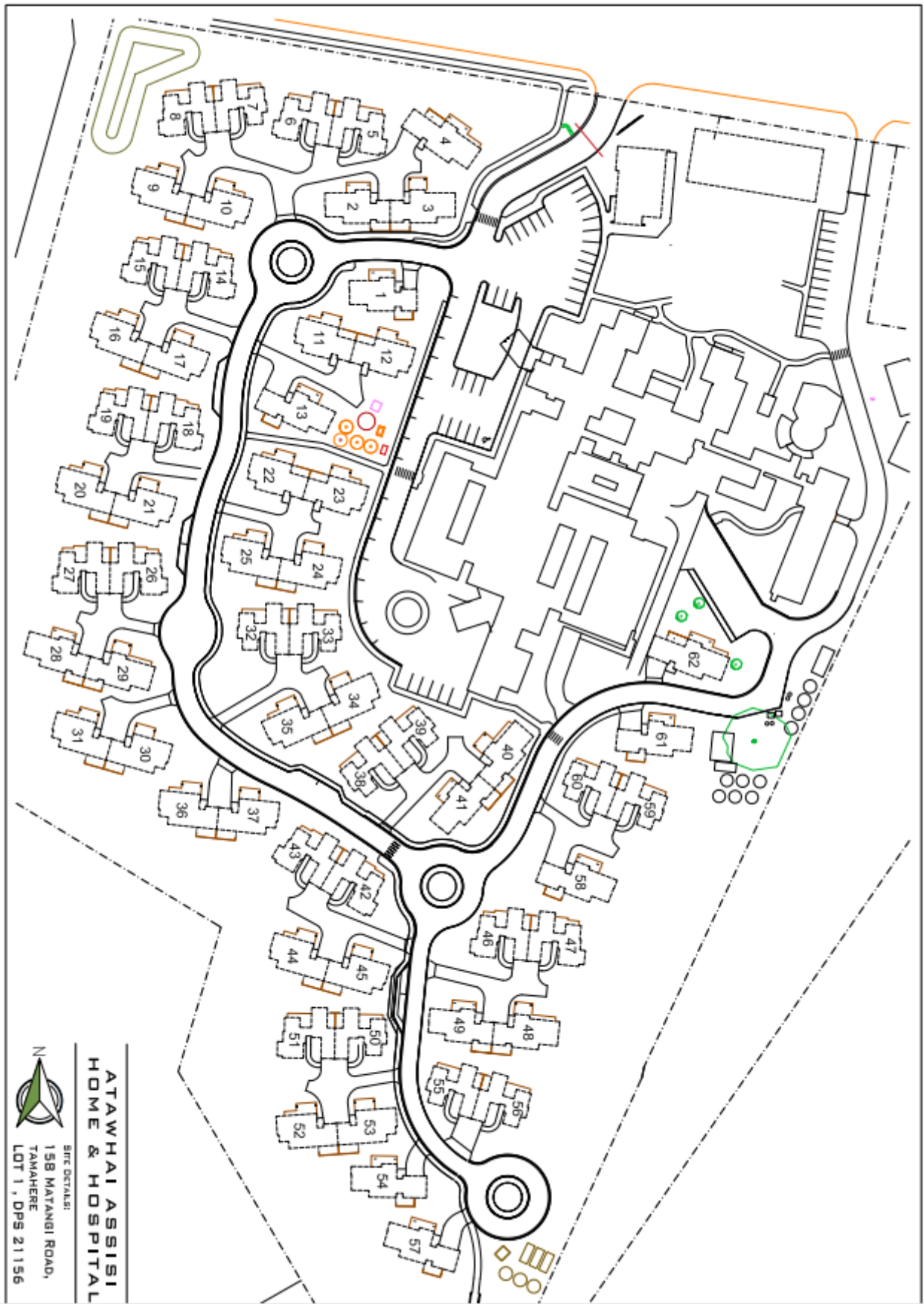
TOTAL GROUND FLOOR AREA: 134.3 sqm (Over Framing)
 TOTAL GROUND FLOOR AREA: 140.7 sqm (Over Cadding)
 COVERED AREA: 9.3 sqm
 TOTAL AREA: 150.0 sqm
 ROOF OUTLINE: 170.0 sqm

TOTAL GROUND FLOOR AREA: 117.5 sqm (Over Framing)
 TOTAL GROUND FLOOR AREA: 122.5 sqm (Over Cadding)
 COVERED AREA: 18 sqm
 TOTAL AREA: 140.5 sqm
 ROOF OUTLINE: 151.2 sqm



**ATAWHAI ASSISI
 HOME & HOSPITAL
 VILLAGE HOUSES - HOUSE 7 & 8**

Site Plan



Calculation of Settlement

Tamahere Eventide Home Trust

Atawhai Assisi Home & Retirement Village

Owner: **Example**
Villa Number XX
Proposed Settlement date 31/10/2022

Original

1 Original Purchase Price 760,000
2 Purchase Date 10/01/2019

Valuation

3 Valuation 880,000
Date 9/11/2019

Depreciation

4 Resale Price 880,000
5 Deferred management fee rate 4%
6 Number of days 1390 (maximum 5 years/ 18:
7 Management Fee 134,049

Settlement Amount

		\$	
8 Resale Price		880,000.00	
Less:		<u>140,589.00</u>	
9 Management Fee	134,049.00		Calculated above
10 Valuation Cost - 50%	400.00		50%
11 Cleaning of villa	150.00		Cleaning contractor
12 Statutory Supervisor - Termination	205.00		Covenant
13 Legal Fee - Deed of Surrender	885.00		Lewis' Barristers & Solicitors
14 Selling Administration	3,450.00		Sale done by Tamahere Eventide Staff
15 Painter & paint	700.00		Contractor
16 Cleaning of drapes	450.00		Contractor
17 Cleaning of blinds	300.00		Contractor

Net settlement amount

739,411.00

The above calculations have been agreed on and for by:

Tamahere Eventide

Date:

Resident/EPOA

Date:

Outgoing Fees

ASSISI VILLA FEES

Forecast of Maintenance Fees 2023-2027

Copy to - Covenant Trustees

Cost Increase at 6% per annum from 2023

	Year ended 30 June					Forecast 2027
	2023	2024	2025	2026	2027	
Forecast of Maintenance Fees						
Income						
Number	17	17	17	17	17	17
Maintenance Fee	501.00	553.00	593.00	631.00	668.00	705.00
Income Total	116,268	116,268	116,268	116,268	116,268	116,268
Expenses						
Audit Fee	816	816	816	816	816	816
Electricity	1,061	1,061	1,061	1,061	1,061	1,061
Insurance	87.00	87.00	87.00	87.00	87.00	87.00
Two Bed	103.00	103.00	103.00	103.00	103.00	103.00
Three Bed	7,416	7,416	7,416	7,416	7,416	7,416
Maintenance - Buildings						
Building Wash	28.50	28.50	28.50	28.50	28.50	28.50
Aircondition Maintenance	0.00	0.00	0.00	0.00	0.00	0.00
General maintenance	16.50	16.50	16.50	16.50	16.50	16.50
Contractors	3,438	3,438	3,438	3,438	3,438	3,438
Future External Maintenance Provision						
Two Bed	9,900	9,900	9,900	9,900	9,900	9,900
Three Bed	6,120	6,120	6,120	6,120	6,120	6,120
Gardening	786	786	786	786	786	786
Staff cost	102.05	102.05	102.05	102.05	102.05	102.05
Lawn Mowing	2.50	2.50	2.50	2.50	2.50	2.50
WDC	27.50	27.50	27.50	27.50	27.50	27.50
Water Supply	14.00	14.00	14.00	14.00	14.00	14.00
Inflow	25.00	25.00	25.00	25.00	25.00	25.00
Waikato Regional Council	3.50	3.50	3.50	3.50	3.50	3.50
Rates	750	750	750	750	750	750
Community Facilities	0.00	0.00	0.00	0.00	0.00	0.00
RVA Membership	2.50	2.50	2.50	2.50	2.50	2.50
Internet & Phone	132.00	132.00	132.00	132.00	132.00	132.00
Registrar of RV	2.00	2.00	2.00	2.00	2.00	2.00
Refuse Collection	5.00	5.00	5.00	5.00	5.00	5.00
Printing	4.00	4.00	4.00	4.00	4.00	4.00
Entertainment/Happy Hr	4.00	4.00	4.00	4.00	4.00	4.00
Security	2.30	2.30	2.30	2.30	2.30	2.30
Statutory Supervisor	6.50	6.50	6.50	6.50	6.50	6.50
Villa Expenses	563.06	563.06	563.06	563.06	563.06	563.06
Surplus/(Deficit)	-18	-18	-18	-18	-18	-18
Maintenance Fee	553	553	553	553	553	553
Two Bed Room	-	-	-	-	-	-
Three Bed Room	601	601	601	601	601	601
Weekly cost	127.62	127.62	127.62	127.62	127.62	127.62
	138.69	138.69	138.69	138.69	138.69	138.69
2 Bed room villa	131.54	131.54	131.54	131.54	131.54	131.54
3 Bed room villa	142.85	142.85	142.85	142.85	142.85	142.85
Forecast 2023	116,268	116,268	116,268	116,268	116,268	116,268
Forecast 2024	119,756	119,756	123,349	127,049	130,861	130,861
Forecast 2025	123,349	123,349	127,049	130,861	134,673	138,485
Forecast 2026	127,049	127,049	130,861	134,673	138,485	142,297
Forecast 2027	130,861	130,861	134,673	138,485	142,297	146,109

Values and Philosophy

1. We believe that the whole of life, from birth to death, has meaning and purpose. Old age is an intrinsic part of all the previous years that a person has lived.
2. We believe that every person, including the very old and frail, is created in the image of God; possess an innate dignity; is loved by God; and that there is nothing in life or death that can separate us from that love.
3. We provide for elderly people regardless of race, culture or creed.
4. We seek within the limitations of our resources, to provide assistance to those in need regardless of their capacity to pay.
5. We believe that the physical and mentally frail are to be provided with special care and consideration, and treated with dignity and respect.
6. We aim to enhance mental health and ability so that maximum independence can be encouraged.
7. Wherever possible, we encourage each resident to make decisions and choices, which affect his/her life.
8. We express a concern for the wholeness of the person by providing an environment that meets the needs of the whole person – physical, mental, emotional and spiritual.
9. We respect individual needs and preferences, encouraging participation in programmes and activities whilst allowing residents freedom of choice.
10. We ensure that adequate resources are provided so that every resident in our home has access to the health care they require.
11. As staff and residents, our aim is to create in this Home, a family atmosphere in which we value, care about and support one another.



Atawhai Assisi Retirement Village
Expression of interest.

Please complete this form and return to the David McGeorge, General Manager Support Services.

We will keep these details on file and keep you informed of unit(s) coming up for sale. Viewing can be arranged by appointment, the telephone number is listed below.

Please contact us with any further questions: Monday to Friday, 9.00 to 17.00 hrs.

Surname..... First Name.....

Address

.....
.....
.....

Telephone No's

(work).....

(phone).....

(mobile).....

(e-mail)

Atawhai Assisi

158 Matangi Road Hamilton, 3283

David McGeorge – General Manager Villages

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E-mail: gmsupport@tamahere.co.nz