

A retirement village that cares



ULTIMATE CARE  
**OAKLAND LODGE**  
— VILLAGE



# About Oakland Lodge Village

Oakland Lodge Village is set in the sort after Avenues in central Tauranga and was once known as Copper Beech Village.

Our affordable and secure apartments free you from the concerns that a large home can bring in later years. You have a choice of one bedroom apartments at Oakland Lodge Village, many have lovely balcony views or have garden access.

If you're keen to be involved, our resident activities are organised with you in mind and we regularly ask for your input. With crafts, games, music and movies there are a wide range of options. There are also regular visits to shopping centers, cafes and events. You decide how much you want to be involved.

As well as enjoying your independence there is also our communal lounge for getting together with other residents. Also available for your use is our well stocked resident library.



# Easy living with a choice of layouts

At Oakland Lodge Village you have the choice of modern one bedroom apartments with a separate bedroom, ensuite bathroom, open plan lounge/dining room, kitchen and laundry facility. Our apartments are suitable for singles as well as couples.

Most of our apartments have either private decks, garden access or balcony's to choose from. Examples of some of our apartment layouts can be seen below.





# Living independently with the added security of knowing that extra assistance is available if needed.

We respect your independence and the way you want to live. You are free to make yourself at home at Oakland Lodge Village with your own furniture and decor.

At some stage in our lives we may require more assistance in our day to day living. We can offer the added peace of mind of an adjoining rest home and hospital complex should the need arise.



Catching up with neighbours for a cup of tea and a chat in the lounge.

## OUR RANGE OF SUPPORT SERVICES

### Choose the support service that is right for you

One of the benefits of living at Oakland Lodge Village is the ability to be able to choose a support service if and when you may require further assistance. Services available for residents are:

- Meals
- Housekeeping
- Laundry
- Bedmaking
- General staff support
- Personal care



Meals provided



Cleaning provided



Personal laundry



Assistance provided



Morning check



Evening check

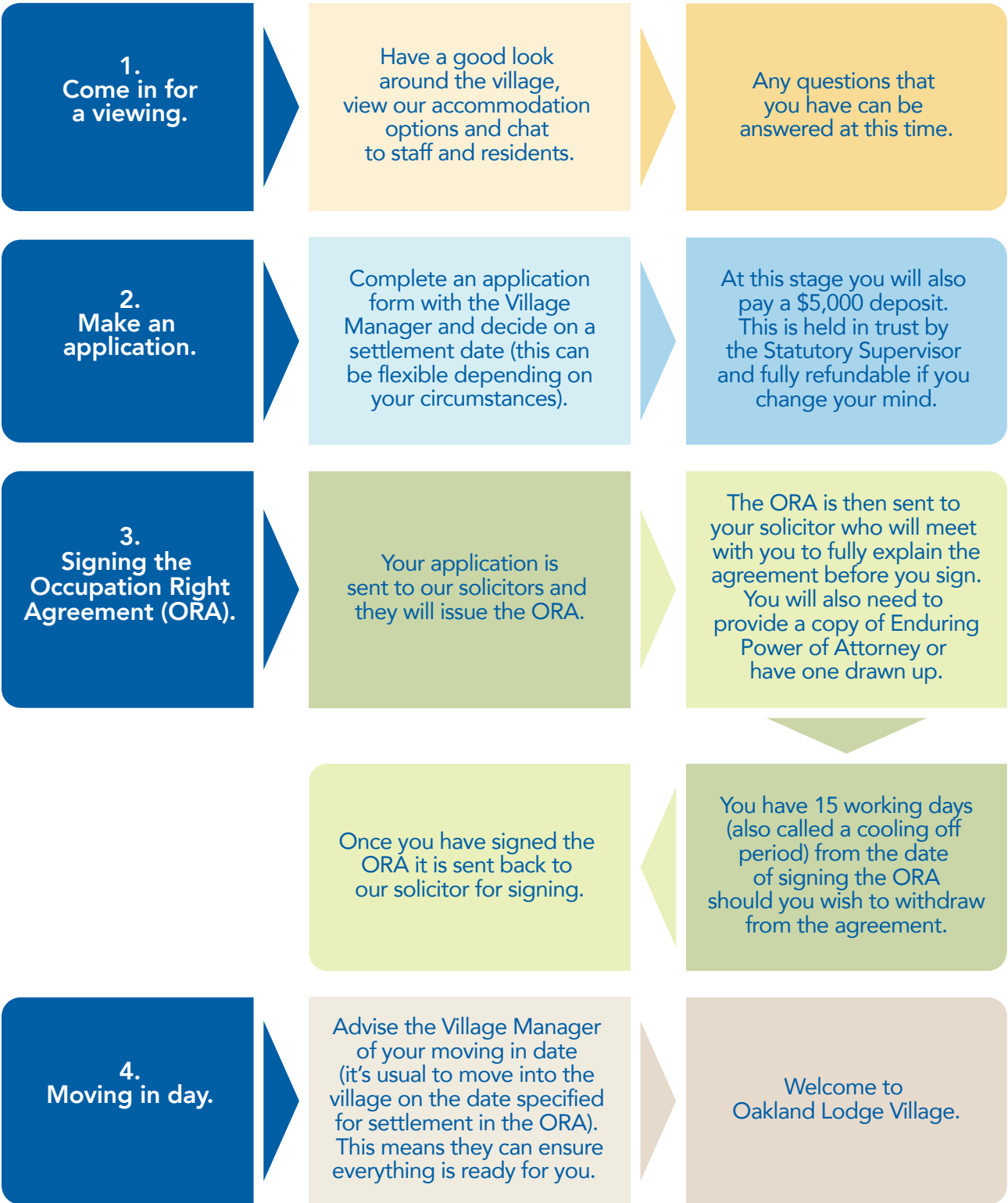




WHAT IS THE PROCESS FROM HERE?

Taking the next steps

The following is a chart showing you the process from your initial viewing through to joining us at Oakland Lodge Village:



RIGHT TO OCCUPY AGREEMENT (ORA)

This is a binding legal document between you and the village owners

WHAT YOU RECEIVE

The right to live in your apartment for your lifetime, plus the right to use the buildings and facilities provided for common use by all residents. e.g. a library or lounge areas.

You also enjoy the other benefits of living in the Village, such as security and organised activities.

WHAT YOU PAY

In addition to the initial purchase price, you will need to pay a weekly contribution fee towards the cost of running the village. These costs are shared by all owners.

See the schedule of expenses included in your ORA. You will need to pay your

solicitor's legal fees when purchasing a unit. Additionally, when moving in you will be offered a suite of services which may be tailored to your requirements. This includes a range of services from laundry and meals up to assistance with showering and other support.

Weekly costs will vary depending on the level of support you choose.

You can change your service package at any time. When purchasing your apartment, these costs may be included in your service package.

Please discuss this with your Village Manager.







## DEFERRED MANAGEMENT FEE (DMF)

When you leave, a Village Contribution or Deferred Management Fee (DMF) is deducted from the amount you or your estate receives. This is a contribution to our general costs incurred in the supply of accommodation, community facilities and related services at the village.

The Village Contribution fee is calculated as a percentage of your purchase price over a number of years of occupancy but is limited to a specified percentage of the purchase price. This amount is specified in your ORA and your solicitor is required to explain this to you before you sign the ORA.

## WHO TAKES CARE OF MAINTENANCE?

The exterior of your unit, any lawns, gardens, infrastructure and common facilities are the responsibility of Oakland Lodge Village. You are responsible for maintaining the interior of your home to the same standard as it was when you moved in, after allowing for fair wear and tear.

## YOUR PROTECTION AND RIGHTS

The Statutory Supervisor for Ultimate Care Group is Covenant Trustee Services and holds a Memorandum of Encumbrance over the land on which the apartments are built. This secures your investment against any other liabilities the owners of the Village may have. The Statutory Supervisor and Village owners have an agreement between them called the Deed of Supervision. You may request a copy of this agreement.

All Ultimate Care Villages are accredited members of the Retirement Villages Association which protects the interests of residents.

For further details please see the Occupation License and Disclosure Statement.

## FREQUENTLY ASKED QUESTIONS

# The information to make an informed decision

### Who owns the unit?

The unit is owned by the Village. Residents do not have title to the land or unit, but they do have the right to occupy their unit for life.

### What financial security do I have for my investment?

The Village land is secured by a first mortgage in favour of the Statutory Supervisor. Your home cannot be provided as security for any debt of the Village operator.

### What happens when I leave?

The Village will refurbish, market and sell the unit at its expense. Once the unit is sold, you or your estate will be paid back your original investment minus the Village contribution.

### What financial reporting is provided?

Annual financial reports are available to residents. The accounts are reviewed by the Company Auditor and the Statutory Supervisor.

### What happens if I change my mind after I initially sign up to purchase an ORA?

You have 15 working days to be sure of your decision before you move into our Village.

### What is a Statutory Supervisor? And what do they do?

The Statutory Supervisor is an independent professional organisation approved by the Registrar of Retirement Villages who provide

residents' protection and guidance. Ultimate Care Oakland Lodge Village Statutory Supervisor Service is provided by Covenant Trustee Services Ltd, PO Box 4243, Shortland Street, Auckland 1015.

### Are there any other expenses?

Every resident can select a service or a suite of services for an all inclusive weekly fee as their needs change.

In addition, you may be responsible for any weekly outgoings such as telephone, TV, power, contents insurance and minor maintenance such as light bulbs.

### Can I rent or lease out my unit?

No. The dwelling is for the sole use of the person or people named in the Occupation License.

### Can my friends and family visit and stay?

We enjoy having your friends and family in the Village. They are welcome to stay with you for up to three weeks, and up to a total of three months annually. All you need to do is let your Village Manager know ahead of time and discuss any details.

### Can I bring my pet?

Please talk to your Village Manager as not all apartments are suitable, so it is on a case-by-case basis. There is a no-replacement policy.

### Who pays for Insurance and Rates?

These costs are included in the Monthly Fees. We remind residents that you are responsible for insuring your contents.



Is there parking available for residents?

Yes, parking spaces are available for residents in a secure area.

If I have a complaint, whom do I raise the issue with?

The Village Manager is the person to talk to. They will try to resolve the issue for you. If you are still not satisfied, the issue can be referred to the Statutory Supervisor. The Retirement Villages Association can

also assist with any problems that cannot be resolved by the Village management.

What if my needs change?

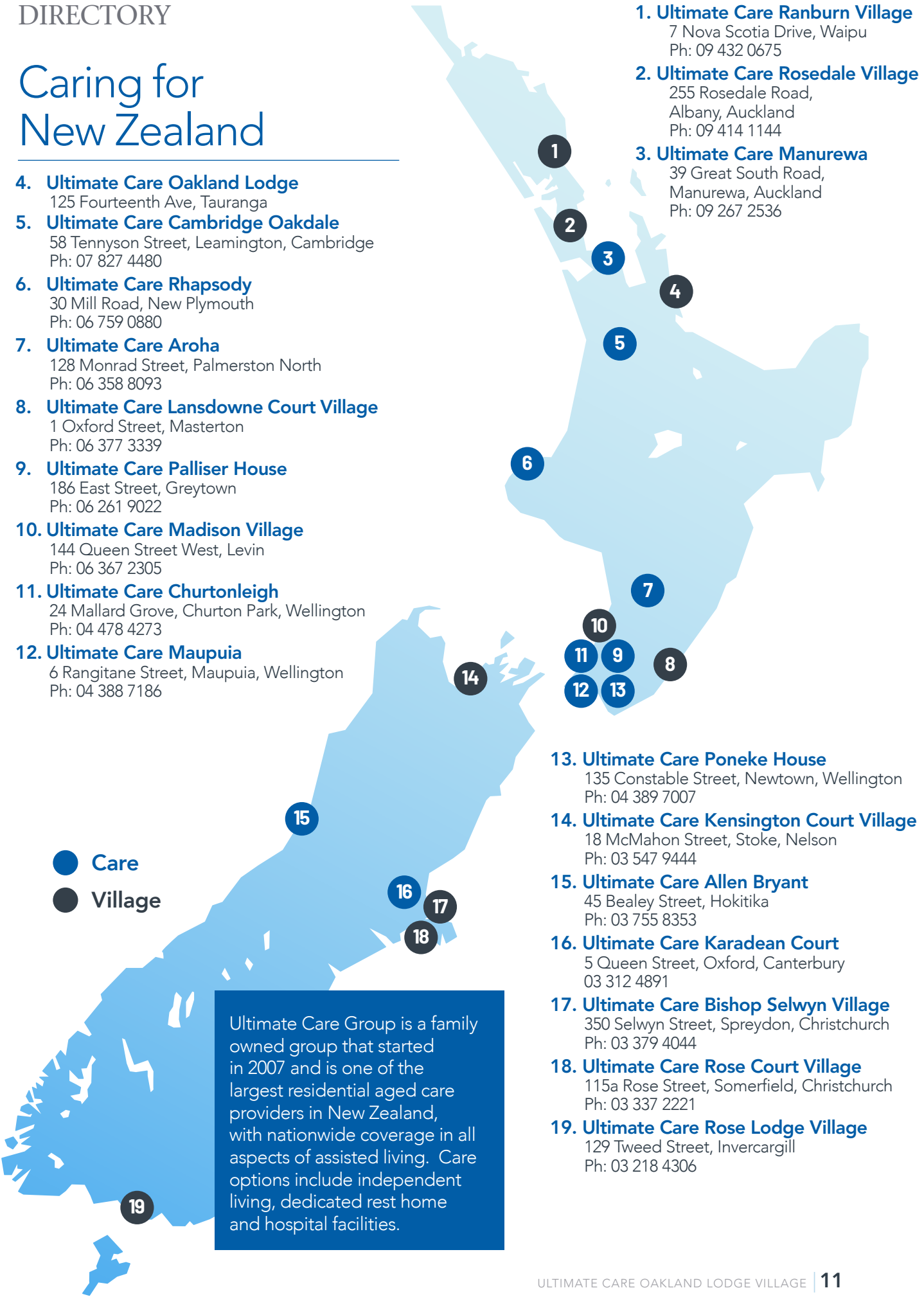
Oakland Lodge Village has an adjoining care facility where residential, rest home and hospital level care is provided. If your needs change please speak to your Village Manager to discuss the care options that are available to you.



DIRECTORY

Caring for New Zealand

- 4. Ultimate Care Oakland Lodge  
125 Fourteenth Ave, Tauranga
- 5. Ultimate Care Cambridge Oakdale  
58 Tennyson Street, Leamington, Cambridge  
Ph: 07 827 4480
- 6. Ultimate Care Rhapsody  
30 Mill Road, New Plymouth  
Ph: 06 759 0880
- 7. Ultimate Care Aroha  
128 Monrad Street, Palmerston North  
Ph: 06 358 8093
- 8. Ultimate Care Lansdowne Court Village  
1 Oxford Street, Masterton  
Ph: 06 377 3339
- 9. Ultimate Care Palliser House  
186 East Street, Greytown  
Ph: 06 261 9022
- 10. Ultimate Care Madison Village  
144 Queen Street West, Levin  
Ph: 06 367 2305
- 11. Ultimate Care Churtonleigh  
24 Mallard Grove, Churton Park, Wellington  
Ph: 04 478 4273
- 12. Ultimate Care Maupuia  
6 Rangitane Street, Maupuia, Wellington  
Ph: 04 388 7186



- 1. Ultimate Care Ranburn Village  
7 Nova Scotia Drive, Waipu  
Ph: 09 432 0675
- 2. Ultimate Care Rosedale Village  
255 Rosedale Road, Albany, Auckland  
Ph: 09 414 1144
- 3. Ultimate Care Manurewa  
39 Great South Road, Manurewa, Auckland  
Ph: 09 267 2536
- 13. Ultimate Care Poneke House  
135 Constable Street, Newtown, Wellington  
Ph: 04 389 7007
- 14. Ultimate Care Kensington Court Village  
18 McMahon Street, Stoke, Nelson  
Ph: 03 547 9444
- 15. Ultimate Care Allen Bryant  
45 Bealey Street, Hokitika  
Ph: 03 755 8353
- 16. Ultimate Care Karadean Court  
5 Queen Street, Oxford, Canterbury  
03 312 4891
- 17. Ultimate Care Bishop Selwyn Village  
350 Selwyn Street, Spreydon, Christchurch  
Ph: 03 379 4044
- 18. Ultimate Care Rose Court Village  
115a Rose Street, Somerfield, Christchurch  
Ph: 03 337 2221
- 19. Ultimate Care Rose Lodge Village  
129 Tweed Street, Invercargill  
Ph: 03 218 4306





**Ultimate Care**  
**Oakland Lodge Village**  
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07 578 2514



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