

Thank you to everyone who attended our seminars - firstly, "Marketing retirement village dwellings and the code of practice" and secondly, "Privacy". These interactive seminars have been an outstanding success and judging by the numbers attending and feedback, we are sure that you have found them of value. Apart from the valuable content there have been great discussions on issues clients deal with in their villages daily and how they have managed them.

Burke Melrose and Settlement Services look forward to presenting a seminar on "enduring powers of attorneys" early next year. This seminar will also cover the vexed question of who a manager should deal with when an occupation licence terminates. If there is a particular issue you have been dealing with in your villages where you would welcome some clarification or feel others may benefit from your experience, we would be only too happy to hear from you.

Marketing retirement village dwellings and the code of practice - focus was on Section 51 of the Code of Practice, key points to note are:

1. Consult with the former resident when the unit goes on the market, be open and transparent about the process;
2. Have a written marketing plan which sets out how you plan to market both the unit and the village;
3. Set out any charges, such as admin charges and refurbishment costs;
4. Keep the former resident informed in writing (*while the code provides for written reports after 3 months we believe it is best practice to report monthly in writing from the time you start marketing the unit*);
5. Ensure the valuation (which is required when a new ORA has not been entered into after 6 months) is up to date and informative.
6. Protect yourself by keeping written records.

Privacy

While there are several privacy principles which could potentially impact on your villages, our seminar focused on Principle 11 – "**limits on disclosure of personal information**" –

"personal information means information about an identifiable individual"

- which informs, instructs, tells or makes aware
- is not confined to the written work but includes any knowledge, however gained or held
- is any information held in a person's memory, which can be recalled.

Key points to note are:

1. Only collect personal information if you really need it
2. Get it straight from the people concerned
3. Tell them what you are going to do with it
4. Be considerate
5. Take care of it once you have got it
6. People can see their personal information if they want to
7. They can ask for it to be corrected if they think it's wrong
8. Ensure personal information is correct before using it
9. Use it for the purpose you got it; and most importantly

Only disclose it if you have authorisation from the individual concerned and otherwise, only in limited circumstances.

If you would like further clarification on matters relating to marketing or privacy please contact your solicitor at Burke Melrose or if you wish to register for upcoming seminars, Jo Robertson at Settlement Services Limited on 09 356-2641.

The information in this article is necessary general. Please contact Burke Melrose if you have specific questions.

NOTIFICATIONS



Settlement Services provides, as a standard service to all clients, email notifications on the status of resident settlements with resident and dwelling details. These notifications include:

- **Conditional applications** Includes all conditional applications, with or without a fixed settlement date. This notification runs weekly each Monday at 4pm.
- **Upcoming settlements** Includes only unconditional applications with a settlement date. This report runs weekly each Monday at 4pm.
- **Start of cooling off period** Advises the start date of cooling off and is only generated once our settlements officers have received residents documents from their solicitor and are secure in the knowledge that documentation is correctly executed. It is possible that you may receive this notification after the cooling off date has started – this can be as a result of a delay in us receiving documents back. This report is generated daily at 4pm.
- **Completed settlements** Lists all settlements completed in the last week, if any, and runs weekly each Monday at 4pm.
- **Cancelled agreements** Once we are notified that an agreement will not proceed for any reason, you will receive this notification advising of the cancellation. This notification runs daily at 4pm.
- **Expiration of cooling off period** Notes the actual date the cooling off period expired for each resident and runs daily at 4pm.

If you have any ideas which may assist in adding to the value of these reports for your organisation, please email **Jo Robertson** at jrobertson@settlements.co.nz or phone me on 09 356 2641.

SETTLEMENT SERVICES NEWS



*Pearl Jathanna
Office Assistant*

Pearl has left us to take up a secretarial role at PricewaterhouseCoopers. We will miss having her around however wish her well in her new role.



*Annette Wildman
Senior Settlements Officer*

Beyond my work hours at Settlement Services, my passion is for gardening. As I live in a central city apartment without any garden, I indulge this interest by volunteering at Scandrett Regional Park on the Mahurangi Peninsula. There is a 130 year old historic house within the Park, and I tend the gardens surrounding the house. Scandrett Homestead is only 20 metres from the beach in a sheltered bay so the garden is a great place to spend a weekend.

The garden is a traditional one following the style of 30 to 50 years ago, using older cultivars of popular plants. The garden is still very much a work in progress, but I continue to be captivated as the garden develops. I will be committed to this volunteer gardening for years to come.





Naomi Johnston (nee Taufua) Settlements Officer

On the 21 August 2010, I made it known to our family and friends my commitment to my soul mate Daniel Johnston.

All our loving family and friends including Burke Melrose Lawyers and Settlement Services Limited staff were present to witness this sacred occasion of ours, as Daniel and I took our vows at the beautiful location of [Gracehill Estate Vineyard, Kumeu, West Auckland](#).



It's been a long 11 months of planning and one can imagine not only the excitement we felt but the relief that all this planning has now come to fruition and without a hitch on this one day. The weather held up, the food was grand (so we're told, we both did not have much of an appetite on the day), wine was splendid and the company was even better. Great memories were made and no doubt, many more to be made as we take this journey together.

At 3am on the 23 August 2010, we made our long and arduous journey towards the heart of Southeast Asia, Thailand, for our much needed and long awaited honeymoon. We spent 3 glorious weeks sightseeing, soaking up the rays and eating like royalty. Overall, it was nice to just kick back, relax and do absolutely nothing.



We hope everyone enjoyed themselves on our wedding day and I'd like to take this opportunity to thank Burke Melrose Lawyers for their support and to Settlement Services Limited for their patience with me and all their hard work in my absence as I enjoyed this milestone in my life.

YOUR SETTLEMENTS TEAM



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