

Policy

Date of last change: 2019-11-15
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Effective Date: 2019-11-15

Settlers Park is committed to helping our Residents while in residence at the Retirement Village. This includes various stages of care requirements which may include downsizing of cottages or relocation to Assisted Living or Care Centre accommodation. It also extends to the family of Residents on the death of their family member when the task of vacating the accommodation unit is required.

Settlers Park Retirement Village has instituted a policy in association with the Settlers Park Association Trust covering how best to aid Residents and / or their family members. Many Residents and/or family members do not know what to do with items not needed or wanted anymore.

It is the policy of Settlers Park to help Residents and their families to find services and businesses that will be useful to them at these difficult times.

The focus of this policy is on dealing with assets that belonged to a Resident who dies while resident in the Park. Similar tasks are required when a Resident moves within the Park, but in that case the Resident (or a member of her/his family) takes control of the process, using whichever identified services they wish to use. Anything donated to the Trust should be packed into labelled boxes and moved out of the cottage while the levy for the cottage is still being paid. If the Resident is unable to do so, a contractor should be engaged at the cost of the Resident to pack and move the goods to storage.

When a Resident dies in a cottage, in an Assisted Living unit, or in Care Centre, the Will of the deceased defines the disposal of assets in the estate. Disposal of personal effects is often included in the Will in very general terms (e.g. "everything to my daughter"), and the practical aspect of getting rid of unwanted items (e.g. an incomplete tea set) is ignored. If one or more items are left to specific people in the Will, or if the estate is to be divided equally between beneficiaries, the entire estate generally has to be formally valued by the executor, and the belongings in the cottage form part of that estate.

Procedure

In the case of the death of a Resident, the responsibilities regarding moveable items are as follows:

- The Resident – During her/his lifetime, the Resident should lodge an envelope with the Park containing:
 - a copy of her/his Will, and a note specifying where the original can be found
 - contact details of the designated executor mentioned in the Will
 - contact details of a designated family member who will act for the estate until the executor has been appointed, and
 - a letter to the family member recording any informal instructions concerning disposal of assets and personal belongings.
- Settlers Park:
 - Secure the assets of the deceased. The cottage should be locked and, if it is possible that other people may have access to keys, the locks must be changed.
 - Notify the designated executor and family member (as listed in our records and/or identified in the envelope) of the death of the Resident and the rules regarding the disposal of assets.
 - Identify items mentioned specifically in the will (or other written instructions from the Resident or her/his family) and secure them for the Executor of the deceased estate (when appointed) or, failing her/him, the designated family representative. This could be a few selected items or the entire household, including broken or unwanted items. If the disposal of these items will take more time than is covered by levy payments, then the Park will move them to a safe place – a store room, or a commercial storage facility at the cost of the Life Right residual value, or the estate.
 - Anything that may need to be disposed of or thrown away can be done by the Park on the Residents' behalf. This will incur a fee depending on the volume of goods as it may be necessary to bring in our cottage organising/cleaning team or another contractor.
- The family member should:
 - Establish what should happen to the remaining assets. Instructions to the Park must be in written form, including giving some or all of the remainder to the Trust or other beneficiaries. A sample form that may be useful is available from Settlers Park Reception.
 - Some specific items may have a price attached that the family wants. If so the price must be specified and agreed with the Trust in a written agreement.
 - The estate, or the residual Life Right, will be responsible for all costs associated with the packing, moving, and storing of goods from the cottage, and additional month(s) of levy, if required, in order to handle the disposal of goods.
- SP Trust – On advice from the Park, the Trust will designate a delivery address for the goods that have been donated to them. The family, or a contractor (at the cost of the estate or residual life right), will pack the goods into numbered boxes and provide a schedule of the contents of the boxes e.g. kitchenware, clothes, ornaments, etc. and a list indicating what has been packed in each box. The Trust will instruct the contractor regarding the disposal of damaged goods.

Appendix A – List of Resources

1. Settlers Park Management – 046 604 0200, info@settlerspark.co.za
2. Settlers Park Welfare Team – 046 604 0200, carecentremgr@settlerspark.co.za
3. Settlers Park Trust – 046 ...?
4. Packing and Cleaning Team: Contact Settlers Park Management
5. Furniture removals: Ace Cartage – Contact Settlers Park Management
6. Handyman: Contact Settlers Park Management