# Policy

Date of last change: 2019-11-13

Date approved by SP Board: TBA

Effective Date: TBA

Settlers Park is committed to providing assistance to 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 still 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 disposition 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 specific 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 as far as 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 disposition 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 disposition 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 designated family representative or, failing her/him, the Executor of the deceased estate (when appointed).  This could be a few selected items or the entire household, including broken or unwanted items.  If the disposition of these items takes more than 30 of vacating days, 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/thrown away can be done by the Park on the Residents’ behalf. This may incur a fee depending on the volume of goods as it may be necessary. As the cottage is to be refurbished there will be no cleaning costs.
* The family member should:
  + Establish what should happen to the remaining assets. Instructions to the Park must be in written form on what to do, including giving some or all of the remainder to the Trust.  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. the Trust will decide if they want those items in the Trust Shop or if the items should be sent to a dealer. The proceeds to o the he nominated beneficiaries. An upfront agreement between the Trust and the family should be in place whereby if the item on sale in the Trust Shop does not realise the price asked for; the Trust may reduce the price to suit.
  + If the item remains unsold for a period in excess of 6 months, the family must either remove the item at cost OR donate it to the Trust to attempt to dispose of it at their discretion.
  + 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 disposition of goods.
  + If the item remains unsold for a period in excess of 6 months , the family must donate them to the Trust to dispose of them at their discretion.
* 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. Anything cracked or broken should be discarded.
* CWHP

# Appendix A – List of Resources

1. Settlers Park Management – 046 604 0200, [info@settlerspark.co.za](mailto:info@settlerspark.co.za)
2. Settlers Park Welfare Team – 046 604 0200, [carecentremgr@settlerspark.co.za](mailto:carecentremgr@settlerspark.co.za)
3. Settlers Park Trust – 046 …?
4. Packing and Cleaning Team: Mrs XXX
5. Furniture removals: Ace Cartage – 046 …
6. Handyman: …