
CONTINUING CARE RETIREMENT COMMUNITIES **2016 REFERENCE GUIDE**

from YOUR North Carolina Department of Insurance



 **North Carolina**
DEPARTMENT OF INSURANCE
WAYNE GOODWIN, COMMISSIONER

A MESSAGE FROM YOUR INSURANCE COMMISSIONER



Dear Consumer,

The North Carolina Department of Insurance is proud to present the 2016 edition of the North Carolina Department of Insurance Continuing Care Retirement Communities Reference Guide. This guide has been compiled by the North Carolina Department of Insurance to assist prospective residents in their search for a continuing care retirement community (CCRC) in North Carolina. CCRCs are unique to the area of long-term care in that they provide a continuum of care to older adults under a contract for the life of an individual, or for a period longer than one year. Continuing care may also include home care services provided or arranged by a CCRC to an individual who has entered into a continuing care contract, but who prefers to remain in their home and may opt to receive on-site lodging at a future date.

Continuing care laws in North Carolina are designed to give you, the consumer, full disclosure concerning a community prior to the execution of a contract for continuing care. These laws exist for your benefit. We urge you to read the disclosure statement and the contract provided to you by a continuing care provider and to ask questions if you are unsure of any of the provisions contained within them. If necessary, seek professional advice from an attorney and/or accountant.

If you have any questions, please contact the **Alternative Markets Division**, Special Entities Section, of the North Carolina Department of Insurance at 919-807-6612.

Sincerely,

A handwritten signature in cursive script that reads "Wayne Goodwin".

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INTRODUCTION

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Continuing Care Retirement Communities (“CCRCs”) are unique to the area of long-term care in that they provide various levels of care within one community to older adults.

Continuing care is defined by the North Carolina General Statute § 58-64-1, "...the furnishing to an individual other than an individual related by blood, marriage, or adoption to the person furnishing the care, of lodging together with nursing services, medical services, or other health related services, under a contract approved by the Department in accordance with this Article effective for the life of the individual or for a period longer than one year. "Continuing care" may also include home care services provided or arranged by a provider of lodging at a facility to an individual who has entered into a continuing care contract with the provider but is not yet receiving lodging..."

In general, CCRCs are communities that provide a continuum of care to older adults under a contract for the life of an individual or for a period longer than one year. Typically there are three levels/stages of care offered by CCRCs:

- 1. Independent Living** – is for individuals who are capable of doing the basic chores of everyday life but who may need occasional help from others.
- 2. Assisted Living** – provides assistance for residents with chronic care needs excluding complete 24-hour skilled nursing care. Assisted living services include helping a resident with bathing, dressing, taking medications, and other daily activities.
- 3. Skilled Nursing Care** – generally provides 24-hour nursing care, rehabilitative services, and assistance with activities of daily living to the chronically ill as well as those who have been hospitalized for an illness or operation and require a short period of rehabilitation before returning home.

CCRCs are generally a collection of apartments, town homes, or cottages and include common activity areas such as a library, activity and craft rooms, a restaurant-like dining room, an assisted living facility, and a nursing home. Other amenities often include banking services, convenience stores, a golf course, walking trails, gardens, swimming pool, fitness center, beauty/barber shops, and guest accommodations.

ENTRANCE FEES

There is usually a large up front payment called an entrance fee required to enter a CCRC. The amount of the entrance fee may depend on the size and type of dwelling you choose, your age, or the type of refund plan you choose. Entrance fees for North Carolina CCRCs range from a few thousand dollars to over one million dollars. However, a typical entrance fee would range anywhere from \$66,000 to \$335,000. Entrance fee refund plans typically fall within one of the following categories:

- 1. Full Refund** – Full refunds are rare, but sometimes offered. A fixed charge may be deducted before the refund is made and the agreement will state for how long the refund is valid and usually under what conditions a refund is due. Entry fees that offer full refunds are typically more expensive than those that are refundable partially or on a declining basis.
- 2. Partial Refund** – Partially refundable entry fees guarantee that a specific percentage of the entrance fee will be refunded. For example, certain contracts guarantee that ninety percent (90%) or fifty percent (50%) of the entrance fee will be refunded upon the death of the resident or termination of the contract.

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3. Declining Refund – With this type of refund, the agreement made specifies a period of time during which the entrance fee will be refundable to the resident on a declining basis. For example, if an entrance fee is refundable and declines at the rate of one percent (1%) per month, then eighty-eight percent (88%) of the entrance fee would be refundable after twelve (12) months.

4. No Refund – Under this type of contract no refund is given.

In addition to the entrance fee, a resident is usually expected to pay a monthly fee. Monthly fees for CCRCs in North Carolina can range from \$1,000 to over \$6,000. However, monthly fees will typically fall within the \$2,000 to \$3,800 per month range.

DISCLOSURE STATEMENT

One of the most important documents you will receive from a continuing care provider will be the disclosure statement. This document is required by law to be given to the person with whom a continuing care contract is being entered into, at the time of, or prior to, the transfer of any money or other property to a provider by, or on behalf of, a prospective resident.

N.C.G.S. 8-64-20 requires the text of the disclosure statement to contain certain disclosures (see Appendix 6). Take your time reading the disclosure statement, and do not be pressured into signing any contract until you have had ample time to read and understand the information contained within it. If after reading the disclosure statement you are confused, or have questions, ask for clarification. **You are also highly encouraged to seek professional advice from an attorney and/or accountant prior to signing any contract for continuing care.**

Copies of all current disclosure statements are available for viewing at the offices of the North Carolina Department of Insurance in Raleigh, NC and on the North Carolina Department of Insurance website (http://www.ncdoi.com/SE/SE_CCRC_Disclosure.aspx).

CONTINUING CARE CONTRACTS

The most distinguishing feature of a CCRC is the contract. A contract is typically defined as a binding agreement between two or more persons or parties. In order for a contract to be considered a continuing care contract, it must provide for lodging, together with nursing services, medical services, or other health related services, and be either for the life of an individual or for a period longer than one year.

TYPES OF CONTRACTS

CCRCs typically offer one (or more) of the following types of agreements or contracts:

1. Extensive – Extensive contracts provide housing, residential services, and healthrelated services in exchange for a price, usually consisting of an entrance fee and a monthly fee. No additional fees are generally required as one moves from one level of care to another.

2. Modified – Modified contracts provide housing, residential services, and a specified amount of health-related services in exchange for an entrance fee and a monthly fee. Healthrelated services are provided at a subsidized rate or are free for a specified number of days.

3. Fee-for-Service – Fee-for-Service contracts provide housing, residential services, and guaranteed

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access to health-related services in exchange for an entrance fee and a monthly fee. Health related services are provided at the going, full per-diem rate.

4. Equity – Equity contracts involve an actual real estate purchase, with a transfer of ownership of the unit. Health-related service arrangements vary.

5. Rental - Rental contracts for terms in excess of one year, provide housing, residential services, and guaranteed access to health-related services in exchange for a monthly rental payment and a monthly fee. Health related services are provided at discounted rates for a specified number of days and then will be at the full per-diem rates.

REQUIRED PROVISIONS

Although contracts may vary from community to community, all must, according to N.C.G.S. §58-64-25, contain certain provisions (see Appendix 6 for details).

ANNUAL DISCLOSURE STATEMENT REVISION

Pursuant to N.C.G.S. § 58-64-30, every licensed provider must file with the North Carolina Department of Insurance a revised disclosure statement, setting forth current information required pursuant to N.C.G.S. § 58-64-20, within 150 days following the end of each fiscal year. The revised disclosure statement must be made available to all of the residents of the facility.

CONTINUING CARE ADVISORY COMMITTEE

Pursuant to N.C.G.S. § 58 -64-80, there is a nine member Continuing Care Advisory Committee that serves in an advisory capacity to both the Commissioner of Insurance and the Special Entities Section of the North Carolina Department of Insurance. Members of the Committee are appointed by the Commissioner of Insurance and serve on the Committee for a two-year term.

By law, the Committee is to consist of at least two facility residents, two representatives of the LeadingAge NC, one individual who is a certified public accountant and licensed to practice in the State of North Carolina, one individual skilled in the field of architecture or engineering, and one individual who is a health care professional. A list of the current Continuing Care Advisory Committee members may be obtained by contacting the Special Entities Section at (919) 807-6612 or (919) 807-6614.

OPERATING RESERVES

All licensed continuing care providers are required, pursuant to N.C.G.S. § 58-64-33, to maintain, after the opening of a facility, an operating reserve equal to fifty percent (50%) of the total operating costs forecasted for the twelve month period following the period covered by the most recent disclosure statement filed with the North Carolina Department of Insurance. However, if a facility maintains an occupancy level (independent and assisted living) in excess of ninety percent (90%), then the provider shall only be required to maintain a twenty-five percent (25%) operating reserve upon the approval of the Commissioner.

Operating reserves are to be funded by cash, by invested cash, or by investment grade securities, including bonds, stocks, U.S. Treasury obligations, or obligations of U.S. government agencies.

Operating reserves can only be released upon the approval of the Commissioner.

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RIGHT TO ORGANIZATION

SELF-ORGANIZATION

A resident living in a facility operated by a provider licensed under N.C.G.S. § 58-64-40 has the right of self-organization, the right to be represented by an individual of his or her own choosing, and the right to engage in concerted activities to keep informed on the operation of the facility in which the resident resides or for other mutual aid or protection.

SEMI-ANNUAL MEETINGS

N.C.G.S. § 58-64-40 requires the board of directors or other governing body of a provider, or its designated representative, to hold semi-annual meetings with the residents of each facility operated by the provider for free discussions of subjects including, but not limited to, income, expenditures, and financial trends and problems as they apply to the facility, and discussions of proposed changes in policies, programs and services. In addition, upon request of the most representative residents' organization, a member of the governing body of the provider, such as a board member, a general partner, or a principal owner shall attend such meetings. Residents shall be entitled to at least seven days advance notice of each meeting, and any agenda or other materials that will be distributed by the governing body at the meetings is to remain available upon request to residents.

DISCLAIMER

The material in this Guide was compiled directly from information provided to the North Carolina Department of Insurance by each facility licensed as of April 2016. The information may or may not be accurate or complete as the services and fees may have changed.

You are urged to contact any facility that you may be interested in, in order to obtain the most current information.

ACKNOWLEDGEMENTS

The North Carolina Department of Insurance would like to acknowledge each facility for their assistance with our publication.

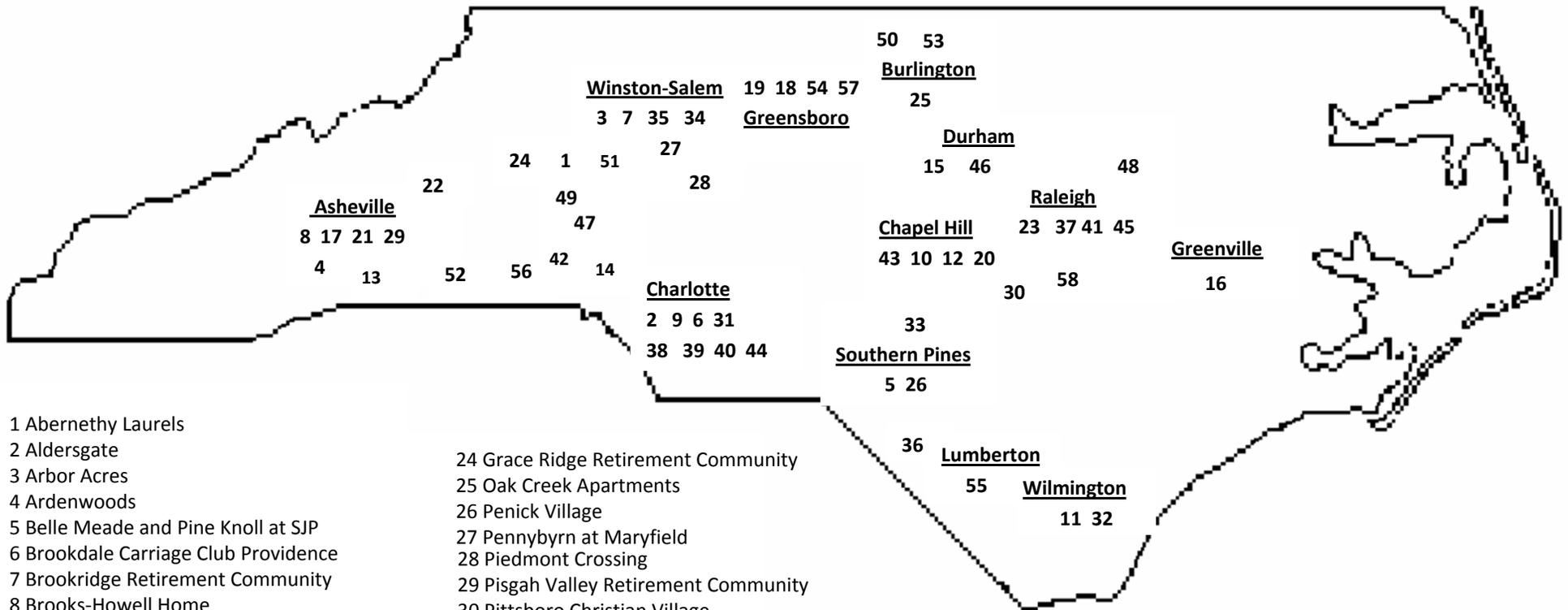
FURTHER INFORMATION

For further information you may contact the Alternative Markets Division, Special Entities Section, at (919) 807-6612 or (919) 807-6614, or by mail at the following address:

North Carolina Department of Insurance

Alternative Markets Division
Special Entities Section
1203 Mail Service Center
Raleigh, NC 27699-1203

North Carolina Continuing Care Retirement Communities



- 1 Abernethy Laurels
- 2 Aldersgate
- 3 Arbor Acres
- 4 Ardenwoods
- 5 Belle Meade and Pine Knoll at SJP
- 6 Brookdale Carriage Club Providence
- 7 Brookridge Retirement Community
- 8 Brooks-Howell Home
- 9 Carmel Hills
- 10 Carol Woods
- 11 Carolina Bay at Autumn Hall
- 12 Carolina Meadows Retirement Community
- 13 Carolina Village
- 14 Covenant Village
- 15 Croasdaile Village Retirement Community
- 16 Cypress Glen Retirement Community
- 17 Deerfield Episcopal Retirement Community
- 18 Friends Homes West
- 19 Friends Homes at Guilford
- 20 Galloway Ridge at Fearington
- 21 Givens Estates
- 22 Givens Highland Farms
- 23 Glenaire

- 24 Grace Ridge Retirement Community
- 25 Oak Creek Apartments
- 26 Penick Village
- 27 Pennybyrn at Maryfield
- 28 Piedmont Crossing
- 29 Pisgah Valley Retirement Community
- 30 Pittsboro Christian Village
- 31 Plantation Estates
- 32 Plantation Village
- 33 Quail Haven Village
- 34 River Landing at Sandy Ridge
- 35 Salemtowne
- 36 Scotia Village Retirement Community
- 37 SearStone
- 38 Sharon Towers
- 39 Sharon Village Apartments
- 40 Southminster
- 41 Springmoor Life Care Retirement Community
- 42 Stanley Total Living Center
- 43 The Cedars of Chapel Hill Club, Inc.
- 44 The Cypress of Charlotte
- 45 The Cypress of Raleigh

- 46 The Forest at Duke
- 47 The Gardens of Taylor Glen
- 48 The Oaks at Whitaker Glen
- 49 The Pines at Davidson
- 50 The Village at Brookwood
- 51 Trinity Oaks
- 52 Tryon Estates
- 53 Twin Lakes Community
- 54 Well-Spring Retirement Community
- 55 Wesley Pines Retirement Community
- 56 White Oak Village Apartments
- 57 Whitestone: A Masonic and Eastern Star Community
- 58 Windsor Point

Address: 102 Leonard Avenue
City: Newton
State: NC
Zip Code: 28658
Phone Number: (828) 464-8260
Fax Number: (828) 465-8573
Toll Free Number: (877) 637-7941
County: Catawba
Web Page: www.abernethylaurels.org
Year Opened: 1971
Licensed Provider: United Church Homes and Services
Provider Tax Status: Not-For-Profit

Self Description:

Nestled on a 120-acre campus in the foothills of the Blue Ridge Mountains of Western North Carolina, Abernethy Laurels has been known as a popular choice in retirement living since 1971. A program of United Church Homes and Services (UCHS), Abernethy Laurels has a long-standing reputation of excellence and is home to a team of skilled professionals committed to serving older adults. We are a full-service continuing care retirement community offering residential (independent) living, assisted living, rehabilitation services, memory support, and long term care.

The Village at Abernethy Laurels offers residential living units with spacious floor plans and outdoor living spaces in cottages, villas, and apartments. Abernethy Laurels offers a fee-for-service approach to community living, where residents make their own selection of services that are tailored to make living easy, enjoyable, and stimulating. At Abernethy Laurels, residents are free to partake in life's adventures without the responsibility of home maintenance and are able to relax in the comfort of knowing that additional supportive services are available should they ever be needed. A primary hope for many seniors is to live independently; Abernethy Laurels' licensed home care program customizes care and services to meet the client's needs within the comfort of their home.

Located in the heart of campus, the Pavilion offers catered living apartments designed for those that desire independence, but who may no longer want the burden of household responsibilities like cooking and cleaning. Residents dine in the Laurel Woods Dining Room and enjoy the conveniences of the hair salon, libraries, game room, arts and crafts room, auditorium/chapel, bank, fitness center, clinic, and much more. Assisted Living opportunities are also located in the Pavilion and are available for those needing a more supportive lifestyle that require help with activities of daily living such as bathing, getting to and from meals, dressing and taking medications.

The Health Center contains 174 licensed nursing beds, which are all duly certified for participation in the Medicare and Medicaid programs. Areas within the Health Center are dedicated for short term rehabilitation, memory care or long term care. Led by a team of dedicated professionals, Abernethy Laurels provides a comprehensive approach to healthcare. Abernethy Laurels is a family of friends. Residents enjoy dining services, gift shop, libraries, game room, fitness classes, picnic area, gardens and much more.

Abernethy Laurels embraces life while furthering its mission: "A Christian ministry committed to providing vibrant senior living opportunities, diverse programs of outreach and compassionate healthcare services."

FEES:

	Low	High
Entrance Fees	\$48,000	\$348,696
Monthly Fees	\$1,322	\$3,378

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|--|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input checked="" type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	184	153	198	83.2%
Assisted Living	18	17	17	94.4%
Nursing Beds:	174	146	146	83.9%
Total:	376	316	361	84.0%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 3800 Shamrock Drive
City: Charlotte
State: NC
Zip Code: 28215
Phone Number: (704) 532-7000
Fax Number: (704) 532-7026
Toll Free Number:
County: Mecklenburg
Web Page: www.aldersgateccrc.com
Year Opened: 1948
Licensed Provider: Aldersgate United Methodist Retirement Community, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Aldersgate is located on a beautiful 234 acre campus in historic East Charlotte. The full continuum of care is available at Aldersgate, from independent living apartments and cottages, to skilled nursing and Alzheimer's care. Amenities include a fitness center, pool, walking trails, private stocked lake, azalea garden and three-hole, par-three golf course.

Aldersgate continues to develop its campus to bring new, state-of-the art accommodations and centers of service excellence. In 2015, Aldersgate will break ground on an expansion of its Cuthbertson Village memory support center, including a new 16-ed neighborhood and renovation of its Town Center. Later in the year, construction will begin on a new 120-bed skilled nursing facility, which will replace its current 100-bed Asbury Care Center. The new care center will be programmed around the person-centered model of care, calling for six unique neighborhoods housing 20 persons each for short or long-term acute care treatment and rehabilitation. Aldersgate accepts Medicare and insurance reimbursement for qualifying stays and therapy services.

Aldersgate is also planning an expansion of its independent living residences. Currently, 62 new apartments and villas are being designed for our campus center, comprising at least seven different one and two-bedroom floor plans across three three-story buildings. A new Town Commons is also planned as part of this expansion, which will include three unique dining options, media center, winter garden, billiard room and a wide variety of other amenities for socialization and recreation

FEES:

	Low	High
Entrance Fees	\$87,500	\$438,708
Monthly Fees	\$1,785	\$4,708

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	249	225	283	90.4%
Assisted Living	92	91	92	98.9%
Nursing Beds:	100	93	93	93.0%
Total:	441	409	468	92.7%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 1240 Arbor Road
City: Winston-Salem
State: NC
Zip Code: 27104
Phone Number: (336) 724-7921
Fax Number: (336) 721-0271
Toll Free Number:
County: Forsyth
Web Page: www.arboracres.org
Year Opened: 1980
Licensed Provider: Arbor Acres United Methodist Retirement Community, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Arbor Acres is a non-profit, nationally accredited continuing care retirement community, affiliated with the United Methodist Church, and located in Winston-Salem, North Carolina. Arbor Acres welcomes people of all faiths. More than 450 residents reside at this beautiful 82-acre campus in independent living, assisted living and skilled nursing accommodations. Minimum age to enter Arbor Acres is 62, however, married couples may enter if one is 62 and the spouse is at least 60.

Independent living accommodations include free standing and duplex homes, and apartments of various sizes. Licensed assisted living areas (102 licensed beds, including a 30 bed dementia unit) serve residents who need closer nursing attention and assistance with dressing, bathing, medications and meals. Arbor Acres is in the process of a renovation project to be completed in October of 2016. When completed the total number of skilled nursing beds will be 83.

FEES:

	Low	High
Entrance Fees	\$30,500	\$370,000
Monthly Fees	\$1,938	\$4,099

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	265	249	311	94.0%
Assisted Living	96	91	91	94.8%
Nursing Beds:	65	61	56	93.8%
Total:	426	401	458	94.1%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 2400 Appalachian Boulevard
City: Arden
State: NC
Zip Code: 28704
Phone Number: (828) 684-0041
Fax Number: (828) 684-7800
Toll Free Number:
County: Buncombe
Web Page: www.ardenwoodslcs.com
Year Opened: 2002
Licensed Provider: Ardenwoods LLC
Provider Tax Status: For-Profit

Self Description:

Ardenwoods is a continuing care retirement community located between Hendersonville and Asheville on 46 beautiful wooded acres in the mountains. The 60 unit assisted living community is referred to as Heather Glen. The community is managed by Life Care Services LLC.

The community clubhouse includes a state of the art fitness center, pool, casual dining grille, computer room, library, and a dining room with a large stone fireplace and breathtaking views.

FEES:

	Low	High
Entrance Fees	\$165,000	\$310,000
Monthly Fees	\$2,400	\$3,035

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	91	88	93	96.7%
Assisted Living	48	44	50	91.7%
Nursing Beds:	0	0	0	0.0%
Total:	139	132	143	95.0%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 100 Gossman Drive
City: Southern Pines
State: NC
Zip Code: 28387
Phone Number: (910) 246-1003
Fax Number: (910) 246-1204
Toll Free Number: (800) 343-7463
County: Moore
Web Page: www.sjp.org
Year Opened: 1999
Licensed Provider: St. Joseph of the Pines, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Belle Meade and Pine Knoll are continuing care retirement communities located in Southern Pines, North Carolina. Both offer a secure environment, and extensive health care services through the nearby Coventry (assisted living) and Health Center (skilled nursing, rehabilitation, and memory support). Residents enjoy privileges at eight area premier courses.

FEES:

	Low	High
Entrance Fees	\$52,223	\$416,233
Monthly Fees	\$1,847	\$4,892

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	295	235	310	79.7%
Assisted Living	78	53	56	67.9%
Nursing Beds:	167	158	158	94.6%
Total:	540	446	524	82.6%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 5800 Old Providence Road
City: Charlotte
State: NC
Zip Code: 28226
Phone Number: (704) 365-8551
Fax Number: (704) 366-4270
Toll Free Number: (877) 225-2831
County: Mecklenburg
Web Page: www.brookdaleliving.com
Year Opened: 1988
Licensed Provider: ARCLP - Charlotte, LLC
Provider Tax Status: For-Profit

Self Description:

The Brookdale Carriage Club Providence is a continuing care community located on a 44 acre site, consisting of seven (7) one, two, and three story apartment buildings and seven fourplex villas, with two large lakes in the center of the property. The Brookdale Carriage Club Providence consists of 275 residential apartments, 54 assisted living apartments, a combined nursing home/home for the aged unit of forty-four (44) beds, comprised of forty-two (42) nursing beds and two (2) home for the aged beds and thirty-four (34) memory enhanced units. The community has generous community spaces including lobby, dining room, auditorium, game rooms, craft room, country store/snack bar, beauty/barber shop, Health Clinics and offices. The Brookdale Carriage Club Providence offers thirteen (13) month agreements, renewable for successive periods of thirteen (13) months. The community began operation in July 1988, and is operated by American Retirement Corporation whose headquarters is in Brentwood, Tennessee. There are no application, registration, or entrance fees except for a nonrefundable membership fee ranging from \$3,850 to \$5,850.

FEES:

	Low	High
Entrance Fees	\$4,850	\$4,850
Monthly Fees	\$2,745	\$5,070

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	276	255	289	92.4%
Assisted Living	88	88	88	100.0%
Nursing Beds:	42	31	31	73.8%
Total:	406	374	408	92.1%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1199 Hayes Forest Drive
City: Winston-Salem
State: NC
Zip Code: 27106
Phone Number: (336) 759-1044
Fax Number: (336) 759-7389
Toll Free Number:
County: Forsyth
Web Page: www.brookridgecommunity.org
Year Opened: 1989
Licensed Provider: Baptist Retirement Homes of North Carolina, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Nestled in 46 acres of Piedmont Pines and hardwoods near the campus of Wake Forest University in Winston-Salem, is the Brookridge Retirement Community. It is a continuing care retirement community, offering varying degrees of care for older adults in state-of-the-art accommodations. The Community offers independent living in one of 46 two-bedroom, two-bath garden homes at the entrance to the Community. It also offers independent living in 93 studio, one-bedroom, and two-bedroom apartments in a congregate setting. The Community also includes an assisted living unit for 26 older adults who need some help with daily tasks, a Memory Enhanced residence for 10 older adults with memory loss, and a 77 bed nursing care center. Brookridge's central building houses an impressive atrium lobby with a wide staircase leading up to the second floor dining room, chapel, parlor, cafe and private dining room. The lobby houses a convenience store, a café, a craft and recreation room, beauty/barber shop, an auditorium, a game room, full-service bank and the administrative offices. The Community features a heated indoor swimming pool and exercise room.

FEES:

	Low	High
Entrance Fees	\$40,967	\$169,113
Monthly Fees	\$1,306	\$2,631

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	138	87	113	63.0%
Assisted Living	36	31	31	86.1%
Nursing Beds:	77	59	59	76.6%
Total:	251	177	203	70.5%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 266 Merrimon Avenue
City: Asheville
State: NC
Zip Code: 28801
Phone Number: (828) 253-6712
Fax Number: (828) 225-2992
Toll Free Number:
County: Buncombe
Web Page: www.brooks-howell.org
Year Opened: 1957
Licensed Provider: United Methodist Women
Provider Tax Status: Not-For-Profit

Self Description:

Brooks-Howell is a continuing care retirement home located on a ten-acre site near downtown Asheville, NC. Shopping, dining, hospitals, physicians offices are all located within a three mile radius of the home.

Independent housing consists of a cottage, 43 one and two-bedroom apartments as well as 17 suites located in the administration building.

The home currently offers many amenities, including beauty/barber shop, arts and crafts center, (also used as an exercise room), pottery, lapidary, audio-visual center, aqua therapy pool, and a chapel designed to seat 200. Also included are a well-stocked library operated by residents, an international room, housing artifacts from around the world along with histories of retired residents who were in missions, numerous lounges offering opportunities for card games, jigsaw puzzles, and meetings of various sorts. There is a formal dining area as well as two small dining areas designed primarily for person needing assistance. A gift shop is open several days a week.

Brooks-Howell is open to retired United Methodist Mission personnel and others approved by the Board of United Methodist Women.

FEES:

	Low	High
Entrance Fees	\$0	\$100,000
Monthly Fees	\$1,236	\$2,060

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	52	45	47	86.5%
Assisted Living	0	0	0	0.0%
Nursing Beds:	49	44	44	89.8%
Total:	101	89	91	88.1%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 2801 Carmel Road
City: Charlotte
State: NC
Zip Code: 28226
Phone Number: (704) 364-8302
Fax Number: (704) 364-8819
Toll Free Number: (800) 755-8302
County: Mecklenburg
Web Page: www.carmelhills.org
Year Opened: 1980
Licensed Provider: Carmel Hills, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Our facilities are located on 15 acres of land on Carmel Road in southeast Charlotte, North Carolina. The property includes a 1 acre lake, walkways through the woods and areas for rest and meditation. The main residential building includes: a comfortable lounge/meeting room with a large fireplace and library of books and magazines, central dining room, 31 apartments, two laundry rooms, guest room and a storage area and "hobby corner" in the basement. Other facilities include: The Assisted Living Care Center - an attached wing to the main building, licensed at 38 beds, one log cabin, and ten cottage/duplex units located around the lake.

FEES:

	Low	High
Entrance Fees	\$81,178	\$195,842
Monthly Fees	\$1,907	\$3,049

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	42	39	44	92.9%
Assisted Living	38	28	28	73.7%
Nursing Beds:	0	0	0	0.0%
Total:	80	67	72	83.8%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 750 Weaver Dairy Road
City: Chapel Hill
State: NC
Zip Code: 27514
Phone Number: (919) 968-4511
Fax Number: (919) 918-3349
Toll Free Number: (800) 518-9333
County: Orange
Web Page: www.carolwoods.org
Year Opened: 1979
Licensed Provider: The Chapel Hill Residential Retirement Center, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Carol Woods is an accredited, not-for-profit continuing care retirement community in Chapel Hill with proximity to UNC Hospitals and Duke Medical Center. Exceptional financial practices, a strong board of directors, and excellent management helps Carol Woods retain an 'A' rating from Standard and Poor's.

Active, independent residents choose from a variety of cottages and apartments situated on 120 wooded acres in Chapel Hill. An entry fee and monthly fee cover a generous package of services that includes weekly housekeeping, utilities, one meal daily and a portion of the cost of future healthcare. On-campus amenities include a heated indoor pool, a fitness center, a craft and woodworking shop, computer room, art studio and a 6,500-volume library.

Carol Woods is accredited by CARF, the sole accrediting body for continuing care retirement communities.

FEES:

	Low	High
Entrance Fees	\$91,100	\$416,300
Monthly Fees	\$2,413	\$5,010

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	312	297	486	95.2%
Assisted Living	89	72	72	80.9%
Nursing Beds:	30	27	27	90.0%
Total:	431	396	585	91.9%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 630 Carolina Bay Dr.
City: Wilmington
State: NC
Zip Code: 28403
Phone Number: (910) 769-7500
Fax Number: (910) 769-7572
Toll Free Number: (866) 455-0599
County: New Hanover
Web Page: www.carolinabayatautumnhall.com
Year Opened: 2015
Licensed Provider: Carolina Bay of Wilmington, LLC
Provider Tax Status: For-Profit

Self Description:

Carolina Bay at Autumn Hall is located in the Autumn Hall neighborhood in Wilmington, NC. Living here residents become part of a heavily wooded, beautifully planned, mixed-use community with a series of walking and biking paths, convenient sidewalks and handsome homes to families of all ages.

Carolina Bay at Autumn Hall opened in 2015 and is located only a few miles from the Atlantic Ocean. Amenities include multiple dining options, a pool and spa, an exercise room and wellness center, and a beautifully appointed courtyard complete with a putting green.

Carolina Bay at Autumn Hall provides residents with the full continuum of care, with 130 units of independent living apartments and Garden Flats as well as a full service, 100 bed healthcare center providing Memory Care, Assisted Living, and Skilled Nursing units.

FEES:

	Low	High
Entrance Fees	\$7,100	\$11,600
Monthly Fees	\$3,550	\$5,800

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|--|---|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input checked="" type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input checked="" type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	130	56	80	43.1%
Assisted Living	70	0	0	0.0%
Nursing Beds:	30	0	0	0.0%
Total:	230	56	80	24.3%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 100 Carolina Meadows
City: Chapel Hill
State: NC
Zip Code: 27517
Phone Number: (919) 942-1014
Fax Number: (919) 929-7808
Toll Free Number: (800) 458-6756
County: Chatham
Web Page: www.carolinameadows.org
Year Opened: 1983
Licensed Provider: Carolina Meadows, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Carolina Meadows is a nationally accredited continuing care retirement community, comprised of 440 independent living units. Apartments in six three-story buildings make up 153 of these units, along with 287 single story villas, in duplex and triplex design. The health center consists of 90 nursing beds. The assisted living facility contains 64 apartments, some of which are two-bedroom units, and a 15-bed memory support unit. Total bed capacity of the assisted living facility is 95 within the 64 apartments and 15-bed memory support unit. All villas are protected by security alarm systems and apartment buildings are monitored by closed circuit TV to provide increased security and peace of mind to our residents.

The Club Center building serves as the campus core. It houses a 400 seat auditorium, resident business center, large enclosed swimming pool and Jacuzzi, spacious fitness center staffed by certified fitness trainers, art studio, craft studio, activity areas, conference rooms, a 75 seat Lecture Hall, library, gift shop, bank branch, and administration offices. Six guest rooms are nestled throughout the apartment buildings which provide increased space for visiting families and guests.

The Club Center also contains the main dining and kitchen facilities. Carolina Meadows' residents enjoy a new 100-seat courtyard dining facility that caters to a more formal setting, a 60-seat private dining area with state of the art audio visual capabilities for private parties and events, a new bakery and coffee shop nestled next to a 98-seat Pub where residents may enjoy gathering for their favorite beverage, traditional and trendy food all with full service. In addition, a new 152-seat market place dining venue provides those looking for a more casual dining experience with a variety of chef stations where fresh entrees are prepared while you watch and wait. For residents wishing for yet another casual, upbeat place for a quick bite or favorite beverage, the Café, located in our Fitness Center, offers a lighter menu. Free WiFi is available in all dining locations and throughout the entire campus.

On site amenities include a nine hole, par-three golf course, two (2) tennis courts, walking trails, a croquet court, bocce courts, fenced and irrigated raised garden beds for those who like to garden and a woodworking shop.

FEES:

	Low	High
Entrance Fees	\$124,700	\$544,500
Monthly Fees	\$2,508	\$2,794

- Note:**
- Fees listed have been provided by the community.
 - All fees listed are for reference and comparison
 - Actual fees may vary from those listed.
 - Fees listed are for single occupancy, additional fees may apply for a second resident.
 - Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input checked="" type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input checked="" type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	440	413	602	93.9%
Assisted Living	79	65	69	82.3%
Nursing Beds:	90	67	67	74.4%
Total:	609	545	738	89.5%

OTHER:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 600 Carolina Village Road
City: Hendersonville
State: NC
Zip Code: 28792
Phone Number: (828) 692-6275
Fax Number: (828) 692-7876
Toll Free Number:
County: Henderson
Web Page: www.carolinavillage.com
Year Opened: 1974
Licensed Provider: Carolina Village, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Carolina Village is located on approximately 93 acres in Hendersonville, NC. The entrance to the community is on U.S. 64, and very convenient to downtown Hendersonville with shopping, churches, hospital and medical facilities. The retirement community is also located within 20 minutes of downtown Asheville offering a wide range of enriched lifestyles opportunities. Carolina Village is a Life Care Community (previously known as CCRC) providing wide range of living options within apartment and cottages. When the need arises for medical service, the residents are entitled to private suites in our Skilled Nursing or Assisted Living. On site physical, occupational, and speech rehabilitation services are available to all of our residents. The residents are the heart and soul of the Village a community full of active, vibrant, accomplished, friendly people. We are the only Life Care provider in our county. Carolina Village offers a variety of amenities and services, but the most important benefit of our community is the unlimited access to healthcare for the rest of your life. A little peace of mind!

FEES:

	Low	High
Entrance Fees	\$95,400	\$352,900
Monthly Fees	\$1,496	\$3,891

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

- Extensive
- Modified
- Fee for Service
- Equity
- Rental (No Entrance Fee)
- Assignment of Assets

Entrance Fee Refund

- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	344	330	461	95.9%
Assisted Living	60	57	57	95.0%
Nursing Beds:	58	55	55	94.8%
Total:	462	442	573	95.7%

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List on (some or all) Units
- Residents on the Board of Directors
- Housekeeping (some or all) in Monthly Fees
- Meals (some or all) in Monthly Fees
- Medicaid Certified
- Medicare Certified
- Pets (some) Allowed
- Emergency Call System
- Swimming Pool/Spa/Sauna
- Transportation Available
- Exercise Room or Programs
- Undergoing Expansion

Address: 1351 Robinwood Road
City: Gastonia
State: NC
Zip Code: 28054
Phone Number: (704) 867-2319
Fax Number: (704) 854-8738
Toll Free Number:
County: Gaston
Web Page:
Year Opened: 1982
Licensed Provider: Covenant Village, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Covenant Village is a continuing care retirement community located on a 32 acre site in Gastonia, North Carolina. Covenant Village's goal is simply to provide a friendly, caring, and supportive environment for people who are active, but want to be relieved of the burdens of maintaining a home, preparing meals and worrying about what will happen as health needs change.

FEES:

	Low	High
Entrance Fees	\$35,000	\$214,500
Monthly Fees	\$2,430	\$5,335

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	182	172	220	94.5%
Assisted Living	33	31	31	93.9%
Nursing Beds:	38	37	37	97.4%
Total:	253	240	288	94.9%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 2600 Croasdaile Farm Parkway
City: Durham
State: NC
Zip Code: 27705
Phone Number: (919) 384-2000
Fax Number: (919) 384-2480
Toll Free Number: (800) 960-7737
County: Durham
Web Page: www.croasdailevillage.com
Year Opened: 1999
Licensed Provider: United Methodist Retirement Homes, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Croasdaile Village is a continuing care retirement community located on more than a 100 acres in the Croasdaile Farm planned residential development in Northwest Durham. It is a community of the United Methodist Retirement Homes, Inc. and managed by Life Care Services LLC. Croasdaile Village is just minutes away from Duke University and Duke University Medical Center.

The Independent residences consist of 101 duplex cottages and homes and 245 apartments in The Homestead. In addition, 56 studio size Independent with Personal Services Apartments are located in Heritage Hall. Friendship House is the assisted living community which has 30 apartments. The Pavilion Health Center has 110 beds and is both Medicaid and Medicare certified.

At Croasdaile Village, residents can enjoy a retirement lifestyle as active as they choose. The terrace floor of The Homestead offers many amenities to include a wellness clinic that is Medicare certified, beauty/barber shop, arts and crafts center and classrooms, aerobics and exercise rooms, locker rooms, game room and access to the swimming pool. The community center, known as the Village Commons offers a card room, library, multi-purpose auditorium, lobby/living room, bank with safe deposit boxes and cash machine, gift shop, private dining/conference room, formal dining room and café. Administrative offices are also located in the Village Commons. Croasdaile Village also has a chapel for worship services.

Our attentive staff takes care of household and maintenance chores so residents have more time family and friends and their favorite activities. Residents enjoy the beautiful, restaurant-style dining room that serves three delicious meals a day.

Residents feel "at home" in the friendly, supportive environment at Croasdaile Village. For the past 14 years, they have experienced independence and freedom along with peace of mind, knowing they are part of a caring community with a trusted reputation.

FEES:

	Low	High
Entrance Fees	\$52,673	\$314,752
Monthly Fees	\$1,670	\$3,816

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	402	375	491	93.3%
Assisted Living	30	29	29	96.7%
Nursing Beds:	110	105	105	95.5%
Total:	542	509	625	93.9%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address:	100 Hickory Street
City:	Greenville
State:	NC
Zip Code:	27858
Phone Number:	(252) 830-0036
Fax Number:	(252) 830-0411
Toll Free Number:	(800) 669-2835
County:	Pitt
Web Page:	www.cypressglen.org
Year Opened:	1987
Licensed Provider:	Cypress Glen Retirement Community
Provider Tax Status:	Not-For-Profit

Self Description:

Cypress Glen Retirement Community is part of the United Methodist Retirement Homes Inc. family, with support from Life Care Services LLC. Cypress Glen is a continuing care retirement community situated on a sprawling 95-acre campus conveniently located in the heart of Greenville. Cypress Glen is only minutes away from East Carolina University, Pitt Community College, Brody School of Medicine and Vidant Medical Center. Cypress Glen offers a variety of options for independent living including 152 apartments and 46 cottages. Residents have access to a full continuum of health care, including a health clinic, 30 beds in assisted living, 30 beds in skilled nursing, 12 rooms in memory care, as well as independence plus care services.

At Cypress Glen, residents can enjoy a retirement lifestyle as active as they choose. There is a wealth of educational, cultural, social, and spiritual activities always available on campus. The Wellness Center is the newest addition to the Cypress Glen campus. The center is comprised of a beautiful salt-water swimming pool, a cardio exercise and weight room, an aerobics room and a Tai Chi court, a beauty and barber salon, and massage therapy. The walking path around the community now includes a garden area and Koi pond. Rooftop dining is accessible from the newly-remodeled café and Four Seasons Room, offering variety with mealtimes when utilized along with the lovely restaurant-style dining room which serves three meals a day.

Other amenities and services include transportation to shopping and scheduled medical appointments, a new library, a chapel for worship, and 24-hour security, to name a few. Our attentive staff takes care of household and maintenance chores so residents have more time with family and friends and their favorite activities.

Residents feel "at home" in the friendly, supportive environment at Cypress Glen. For over 27 years they have experienced independence and freedom along with peace of mind, knowing they are part of a caring community with a trusted reputation.

FEES:

	Low	High
Entrance Fees	\$18,965	\$225,778
Monthly Fees	\$1,675	\$4,579

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input checked="" type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	198	182	218	91.9%
Assisted Living	42	41	41	97.6%
Nursing Beds:	30	27	27	90.0%
Total:	270	250	286	92.6%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1617 Hendersonville Road
City: Asheville
State: NC
Zip Code: 28803
Phone Number: (828) 274-1531
Fax Number: (828) 274-0238
Toll Free Number: (800) 284-1631
County: Buncombe
Web Page: www.deerfieldwnc.org
Year Opened: 1955
Licensed Provider: Deerfield Episcopal Retirement Community, Inc. 
Provider Tax Status: Not-For-Profit

Self Description:

Established in 1955, Deerfield is situated on 125 acres just south of Asheville, adjacent to the Blue Ridge Parkway. It is conveniently located to shopping, hospitals, a regional airport, the Biltmore Estate and Gardens, seniors' educational opportunities, and a variety of other services and points of interest. Deerfield is a full LifeCare community, with 75 cottages, 10 villas, 13 cluster homes and 253 apartments, with 27 additional cottages and villas under development. A state-of-the-art health care facility is licensed for 62 beds and 60 assisted living residences.

A 48,000 square foot community center offers casual and formal dining, beverage lounge, library, meeting space, a bank, a store, computer center, and a large event room. The health and wellness center offers aerobics and fitness rooms, medical clinic and therapy center, beauty/barber salon, arts & crafts studios including a fully equipped pottery studio, state-of-the-art aquatic center, day spa and a host of other amenities.

FEES:

	Low	High
Entrance Fees	\$194,016	\$565,689
Monthly Fees	\$2,667	\$4,468

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	351	338	495	96.3%
Assisted Living	60	60	60	100.0%
Nursing Beds:	62	59	59	95.2%
Total:	473	457	614	96.6%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 925 New Garden Road
City: Greensboro
State: NC
Zip Code: 27410
Phone Number: (336) 292-8187
Fax Number: (336) 854-9137
Toll Free Number:
County: Guilford
Web Page: www.friendshomes.org
Year Opened: 1968
Licensed Provider: Friends Homes, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Friends Homes at Guilford is located on 19 acres of land in beautiful northwest Greensboro, North Carolina. Since its inception is 1968, Friends Homes has continued to expand and innovate as it seeks to provide the best possible environment for retirement living.

The campus today includes ten independent cottages plus three multi-story apartment buildings for independent living, a two-story assisted living facility and a spacious nursing facility. The apartment buildings offer accommodations ranging from economical Studio units to spacious two-bedroom deluxe units. The buildings of the main campus are inter-connected and contain an extensive array of support and activity areas.

The newly renovated dining room serves three meals each day. The Dogwood Deli is open for lunch three days a week offering a casual dining experience. The beautifully landscaped campus has many courtyards providing patios, decks, benches, flower and vegetable gardens and walking paths for residents to share and enjoy. There are many conveniences on campus including two beauty shops, a convenience store/gift shop, fitness room, art studio, wood-working shop, library, reading room, craft rooms, guest quarters, lounges and meeting rooms.

With Guilford College just across the street and stores, churches, banks and restaurants in the neighborhood, a full and rich life could not be more convenient.

FEES:

	Low	High
Entrance Fees	\$2,000	\$130,000
Monthly Fees	\$1,575	\$3,162

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	197	193	225	98.0%
Assisted Living	52	47	47	90.4%
Nursing Beds:	69	66	66	95.7%
Total:	318	306	338	96.2%

OTHER:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 6100 W. Friendly Avenue
City: Greensboro
State: NC
Zip Code: 27410
Phone Number: (336) 292-9952
Fax Number: (336) 294-0129
Toll Free Number:
County: Guilford
Web Page: www.friendshomes.org
Year Opened: 1993
Licensed Provider: Friends Homes, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Friends Homes West is a non-profit Continuing Care Retirement Community, located on 54 acres of land. Located in one of Greensboro's most beautiful neighborhoods, the campus has open acreage, a historic barn and is within minutes of colleges and universities, with easy access to cultural events, local libraries, major transportation arteries and to the Triad International Airport.

Friends Homes West is managed by and affiliated with Friends Homes, Inc., which has over 45 years of experience in providing retirement options for seniors.

The Friends Homes West campus consists of interconnected apartment buildings with centrally located amenities including dining rooms, library, beauty/barber shop, gift shop, woodworking shop, lounges, an out-patient clinic, a fitness center, heated indoor pool and other multi-purpose rooms. Friends Homes West offers recreational, educational, cultural and spiritual activities and opportunities to its residents. The grounds of Friends Homes West include a pond, gazebo, garden plots and walking paths as well as several rose and other gardens throughout the campus.

Our five independent living buildings contain 171 spacious apartments, with large windows to allow in natural light, beautiful views and ample closet space.

The community has a health care center with private rooms; 40 rooms in assisted living and 40 rooms in health care for those in our community who may need those services.

FEES:

	Low	High
Entrance Fees	\$80,000	\$120,000
Monthly Fees	\$2,224	\$3,162

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	171	156	190	91.2%
Assisted Living	40	36	36	90.0%
Nursing Beds:	40	36	36	90.0%
Total:	251	228	262	90.8%

OTHER:

- | | |
|---|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 3000 Galloway Ridge
City: Pittsboro
State: NC
Zip Code: 27312
Phone Number: (919) 545-2215
Fax Number: (919) 545-2220
Toll Free Number: (888) 763-9600
County: Chatham
Web Page: www.gallowayridge.com
Year Opened: 2005
Licensed Provider: Galloway Ridge, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

The Wall Street Journal has described Galloway Ridge at Fearington as a "prototype for future housing developments for older Americans". Located on 50 acres on the edge of Fearington Village, an 1100 acre planned community just south of Chapel Hill and the University of North Carolina.

Galloway Ridge at Fearington, is one of the Lifecare CCRC in the triangle, includes both apartment homes and freestanding villas. The apartment sizes range from 820 square feet to nearly 1700 square feet and the villas are from 1566 to nearly 3000 square feet. The Commons includes 3 beautiful dining venues: an informal café, and casually elegant Bistro and a fine dining room with a true gourmet menu. Residents also enjoy our enlarged Belties Pub with live entertainment.

Galloway Ridge offers an on-site Duke Center for Living, a 20,000+ square foot fitness center as well as a full service primary care clinic operated by Duke Physicians and personnel five days/week. Also on site is a University of North Carolina clinic operated by UNC geriatricians. Nationally known Life Care Services (LCS) provides marketing and financial services to Galloway Ridge.

FEES:

	Low	High
Entrance Fees	\$210,000	\$1,075,000
Monthly Fees	\$2,746	\$5,282

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	300	287	392	95.7%
Assisted Living	51	36	36	70.6%
Nursing Beds:	40	33	33	82.5%
Total:	391	356	461	91.0%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 2360 Sweeten Creek Road
City: Asheville
State: NC
Zip Code: 28803
Phone Number: (828) 274-4800
Fax Number: (828) 771-2233
Toll Free Number: (800) 618-0682
County: Buncombe
Web Page: www.givensestates.org
Year Opened: 1979
Licensed Provider: The Givens Estates, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Givens Estates is located in the heart of the Blue Ridge Mountains on 215-acres in Asheville, North Carolina. The campus and architecture have been carefully designed to reflect the rustic charm and natural beauty of the property and surrounding area. The southern mountain climate provides four distinct and enjoyable seasons.

Givens Estates offers an array of living options. Attractively designed apartments, villas, duplexes and individual houses are among the residential options. Most recently Givens Estates has built new Creekside Apartment Homes on the campus. In addition, home care, assisted living, short term rehabilitative and skilled nursing care are provided to serve the changing needs of residents.

Givens Estates offers a variety of dining options in the Bistro and private dining rooms, a Wellness Center with a swimming pool and spa, Performing Arts Center, Chapel, Art and Pottery Studios, Library and Media Center, Gift Shop, Arboretum, Greenhouse, Woodworking Shop, 5 miles of hiking trails, and more. Residents have many life enriching programs from which to choose including but not limited to foreign language and art classes, lectures, performing arts productions, book clubs, fitness classes, gardening, nature walks, and social events. Resident engagement through volunteering and outreach in the Asheville Community at large is an important part of the Givens Estates culture and is coordinated by the resident Volunteer Partner Agency Board.

Givens Estates has been accredited by CARF-CCAC since 1998. The community's financial strength has earned it a BBB bond rating from Fitch.

FEES:

	Low	High
Entrance Fees	\$35,350	\$1,015,500
Monthly Fees	\$1,260	\$3,648

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	373	354	481	94.9%
Assisted Living	61	61	62	100.0%
Nursing Beds:	70	64	64	91.4%
Total:	504	479	607	95.0%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 200 Tabernacle Road
City: Black Mountain
State: NC
Zip Code: 28711
Phone Number: (828) 669-6473
Fax Number: (828) 669-2817
Toll Free Number:
County: Buncombe
Web Page: www.givenshighlandfarms.org
Year Opened: 1971
Licensed Provider: Givens Highland Farms, LLC
Provider Tax Status: Not-For-Profit

Self Description:

With a 45-year tradition of providing a strong sense of community for its nearly 350 residents, Givens Highland Farms offers a wide variety of accommodations and a full continuum of services. It's 55 acre campus is nestled in a cove surrounded by the beautiful Western North Carolina Mountains.

Givens Highland Farms' community features 215 independent living accommodations that include freestanding homes, condominiums, cluster homes, garden apartments, and apartments with lifestyle assistance. More comprehensive care is available in the assisted living and skilled nursing areas.

In addition to its close proximity to the numerous cultural and lifelong learning opportunities available in Black Mountain and Asheville, NC, the community itself has a full spectrum of amenities that offer opportunities for continuing an active and enriching life. Just a few of these include: a 5,000-volume library, fitness classes and an exercise area, a spacious arts and crafts area, a fully-equipped woodworking shop, and a large community garden, winter greenhouse and dog park.

Residents have designed and are involved in over 36 interest groups within the community. These offer many opportunities for sharing skills and talents as well as serving others.

FEES:

	Low	High
Entrance Fees	\$31,500	\$399,000
Monthly Fees	1,336	3,988

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input checked="" type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	212	206	260	97.2%
Assisted Living	30	22	21	73.3%
Nursing Beds:	60	39	39	65.0%
Total:	302	267	320	88.4%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 4000 Glenaire Circle
City: Cary
State: NC
Zip Code: 27511
Phone Number: (919) 460-8095
Fax Number: (919) 467-0844
Toll Free Number: (800) 225-9573
County: Wake
Web Page: www.glenaire.org
Year Opened: 1993
Licensed Provider: Glenaire, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Glenaire occupies a wooded 30-acre site at the northwest corner of Kildaire Farm and Cornwall Roads, at the center of Cary, but within 10 miles of a major airport. The site is surrounded by established residential neighborhoods, yet is within walking distance of essential shops and services. The focal point of the campus, the community center, houses major service functions and is linked to the health care facility and the apartments through enclosed walkways. 48 cottages encircle a pond and older trees.

In 2006, a new space was built to house an adult day care program, a key component in dementia services. In 2007, an aquatic center, expanded exercise rooms, a café; and a larger library were added to the community center.

Glenaire is managed by and affiliated with the Presbyterian Homes, Inc.

FEES:

	Low	High
Entrance Fees	\$61,000	\$312,000
Monthly Fees	\$2,188	\$3,438

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	212	207	272	97.6%
Assisted Living	49	48	48	98.0%
Nursing Beds:	71	64	64	90.1%
Total:	332	319	384	96.1%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 500 Lenoir Road
City: Morganton
State: NC
Zip Code: 28655
Phone Number: (828) 580-8300
Fax Number: (828) 580-8309
Toll Free Number: (800) 331-6941
County: Burke
Web Page: www.graceridge.org
Year Opened: 1987
Licensed Provider: Grace Life, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Grace Ridge is located on 52 wooded acres in a beautiful area in the foothills of Western North Carolina with panoramic views of the Blue Ridge Mountains and the Catawba River Valley.

We offer many choices in accommodations and entrance fee options.

Grace Ridge is complimented by its affiliation with Blue Ridge Healthcare System.

Located with the city limits of the charming City of Morganton, a progressive, small town, Grace Ridge offers apartments, cottage homes and an on-site healthcare center.

Grace Ridge has received accreditation from CCAC/CARF. This is an assurance that Grace Ridge meets vigorous CCAC/CARF guidelines for service and quality.

FEES:

	Low	High
Entrance Fees	\$43,050	\$286,895
Monthly Fees	\$1,084	\$3,279

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input checked="" type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	149	117	144	78.5%
Assisted Living	47	39	39	83.0%
Nursing Beds:	25	23	23	92.0%
Total:	221	179	206	81.0%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 343 Baldwin Road
City: Burlington
State: NC
Zip Code: 27217
Phone Number: (336) 226-5739
Fax Number: (336) 226-5072
Toll Free Number:
County: Alamance
Web Page: www.whiteoakindependentliving.com
Year Opened: 1985
Licensed Provider: White Oak Manor - Burlington, Inc.
Provider Tax Status: For-Profit

Self Description:

Oak Creek is made up of fifty-four one and two bedroom apartments, carefully planned to provide convenience, safety and privacy. Emergency call systems are installed in each apartment and connected to the nurses' station in the adjacent White Oak Manor Nursing Center. Enjoy your independence, knowing that caring and qualified people are close at hand, if needed. The White Oak Manor Nursing Center is a licensed, 160 bed, Medicare and Medicaid certified nursing facility, staffed 24 hours a day with health professionals. Oak Creek Apartments are located in Burlington, North Carolina, in the center of a progressive tri-city region.

FEES:

	Low	High
Entrance Fees	\$0	\$30,000
Monthly Fees	\$1040	\$1,920

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	52	45	53	86.5%
Assisted Living	0	0	0	0.0%
Nursing Beds:	160	137	137	85.6%
Total:	212	182	190	85.8%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 500 East Rhode Island Ave
City: Southern Pines
State: NC
Zip Code: 28387
Phone Number: (910) 692-0300
Fax Number: (910) 692-5509
Toll Free Number: (866) 545-1018
County: Moore
Web Page: www.penickvillage.org
Year Opened: 1964
Licensed Provider: Penick Village, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Penick Village provides a quality of life which blends personal freedom and security, so as to encourage residents to experience their own uniqueness as a person. Located in Southern Pines amidst the longleaf pines, dogwoods and azaleas, the campus emphasizes the beauty and quietness of life in tune with God's creation.

Penick Village's mission we are a family creating a loving community by making each day great for one another.

Penick Village's vision is we have an uncompromising commitment to deinstitutionalize the aging experience.

FEES:

	Low	High
Entrance Fees	\$33,835	\$352,692
Monthly Fees	\$1,753	\$3,968

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

- Extensive
- Modified
- Fee for Service
- Equity
- Rental (No Entrance Fee)
- Assignment of Assets

Entrance Fee Refund

- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	152	140	197	92.1%
Assisted Living	42	38	38	90.5%
Nursing Beds:	50	44	44	88.0%
Total:	244	222	279	91.0%

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List on (some or all) Units
- Residents on the Board of Directors
- Housekeeping (some or all) in Monthly Fees
- Meals (some or all) in Monthly Fees
- Medicaid Certified
- Medicare Certified
- Pets (some) Allowed
- Emergency Call System
- Swimming Pool/Spa/Sauna
- Transportation Available
- Exercise Room or Programs
- Undergoing Expansion

Address: 109 Penny Road
City: High Point
State: NC
Zip Code: 27260
Phone Number: (336) 821-4000
Fax Number: (336) 886-7197
Toll Free Number:
County: Guilford
Web Page: www.pennybyrnatmaryfield.org
Year Opened: 1979
Licensed Provider: Maryfield, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Pennybyrn at Maryfield is a non-profit Continuing Care Retirement Community. Sixty years of experience enables Pennybyrn to offer independence, health security, gracious living and peace of mind. Pennybyrn is conveniently located within minutes of many cultural events, local libraries, colleges, golf courses and an international airport. Maryfield, Inc. began in 1947 with a 22-bed nursing home. Today, the Retirement Community includes 49 independent living cottages, 131 independent living apartments, 48 assisted living residences (24 traditional, 24 memory support) and 125 skilled nursing beds. Attached to the apartment building is a community center and wellness center that offer a wide range of amenities including a pool, exercise rooms, two dining venues, a library, a bank and multi-purpose rooms.

In addition, the health center (skilled nursing) has been reconfigured to a household model of care from a more institutional model of care. There are 6 households with 18-22 beds each. The households each have a kitchen, living room, dining room, and an outdoor patio. Each has easy access to an indoor town square that offers a beauty shop, exercise room, therapy room, café, private dining room and a play area for children.

FEES:

	Low	High
Entrance Fees	\$66,200	\$410,500
Monthly Fees	\$1,621	\$4,574

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	180	179	225	99.4%
Assisted Living	48	45	45	93.8%
Nursing Beds:	125	113	113	90.4%
Total:	353	337	383	95.5%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 100 Hedrick Drive
City: Thomasville
State: NC
Zip Code: 27360
Phone Number: (336) 472-2017
Fax Number: (336) 474-3895
Toll Free Number: (800) 678-8174
County: Davidson
Web Page: www.piedmontcrossing.org
Year Opened: 1986
Licensed Provider: United Church Homes and Services
Provider Tax Status: Not-For-Profit

Self Description:

Located in the Piedmont Triad Area of North Carolina, Piedmont Crossing has been known as a popular choice for retirement living for nearly 30 years. A program of United Church Homes and Services (UCHS), Piedmont Crossing is situated on a beautiful 60-acre campus. We are a full-service continuing care retirement community offering residential (independent) living, assisted living, rehabilitation services, memory support and long term care.

The Village at Piedmont Crossing offers residential living units with spacious floor plans in cottages, villas, apartments and patio homes. Piedmont Crossing offers a fee-for-service approach to community living, where residents make their own selection of services, which are tailored to make living easy, enjoyable, and stimulating. At Piedmont Crossing, residents are free to partake in life's adventures without the responsibility of home maintenance and are able to relax in the comfort of knowing that additional supportive services are available should they ever be needed. A primary hope for many seniors is to live independently; Piedmont Crossing's licensed home care program customizes care and services to meet the client's needs within the comfort of their home.

The Pavilion is located in the main building and offers catered living options in one or two-bedroom apartments designed for those that desire independence, but who may no longer want the burdens of household responsibilities like cooking and cleaning. Assisted Living opportunities are also located within the Pavilion and are available for those needing a more supportive lifestyle with daily activities such as bathing, dressing, and medication management.

The Health Center, a Medicare and Medicaid-certified skilled nursing facility, focuses on the household model of care and provides a full array of services tailored to serve the acuity needs of each individual. Piedmont Crossing values a person-centered approach to care in a family-friendly atmosphere. Our Health Center services include rehabilitation, memory support and long-term care. Led by a team of dedicated professionals, Piedmont Crossing provides a comprehensive approach to healthcare. Piedmont Crossing is a family of friends. Residents enjoy dining services, gift shop, libraries, game room, fitness classes, picnic area, gardens and much more.

Piedmont Crossing embraces life while furthering its mission: "A Christian ministry committed to providing vibrant senior living opportunities, diverse programs of outreach and compassionate healthcare services."

FEES:

	Low	High
Entrance Fees	\$46,750	\$316,724
Monthly Fees	\$1,390	\$2,926

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|--|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input checked="" type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	164	152	195	92.7%
Assisted Living	20	20	20	100.0%
Nursing Beds:	114	105	105	92.1%
Total:	298	277	320	93.0%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 95 Holcombe Cove Road
City: Candler
State: NC
Zip Code: 28715
Phone Number: (828) 667-9857
Fax Number: (828) 665-4666
Toll Free Number:
County: Buncombe
Web Page: www.pisgahvalley.org
Year Opened: 1975
Licensed Provider: Carolina Adventist Retirement System, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Pisgah Valley Retirement Community is a senior living and health care ministry of the world-wide Seventh-day Adventist Church and is affiliated with the Carolina Conference of Seventh-day Adventists. Our community is open to all denominations and has been providing housing and care for residents since 1975. Our operational philosophy is that all residents expect and deserve an environment that provides and promotes opportunities for the enhancement of each person’s individual physical, mental and spiritual well-being. Emphasis is placed on the development and preservation of a healthy lifestyle. Our community offers Independent Living, Assisted Living, Short-term Rehabilitation and Skilled Nursing. We also have a Wellness Center where our residents can enjoy a pool, sauna, whirlpool, Nautilus cardio and strength training equipment.

Pisgah Valley is nestled in the Smokey Mountains of Western North Carolina - located 10 minutes from downtown Asheville and only minutes from the Blue Ridge Parkway and the Smokey Mountain National Park.

FEES:

	Low	High
Entrance Fees	\$170,200	\$219,300
Monthly Fees	\$1,175	\$1,175

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	34	34	44	100.0%
Assisted Living	24	23	24	95.8%
Nursing Beds:	118	116	116	98.3%
Total:	176	173	184	98.3%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1825 East Street
City: Pittsboro
State: NC
Zip Code: 27312
Phone Number: (919) 542-3151
Fax Number: (919) 542-5919
Toll Free Number:
County: Chatham
Web Page: www.pcvnc.org
Year Opened: 1972
Licensed Provider: Pittsboro Christian Village, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Pittsboro Christian Village is located on a 40 acre tract of land in Pittsboro, North Carolina. Pittsboro is a small town of 4,000 people, located in Chatham County in central piedmont North Carolina. It is located at the intersection of U.S. 15-501 and U.S. 64 and is 17 miles south of Chapel Hill.

Many residents enjoy living in freestanding homes on the campus, with yards cared for by the Village staff. Residents can choose from two-bedroom Cottages and Patio Homes or three bedroom Heritage Homes. We offer apartments with and without kitchens. All apartments are part of the manor. So you can check your mail, attend activities, and go to the dining room, all without going outside. Many residents start in one of our homes and later move into an apartment to simplify their lives and free up time to continue enjoying life. Residents living in a Studio Apartment are provided meals, in the fellowship and comfort of our dining room. In January 2009, we opened our North Wing. We created these apartments with the idea that you can live here, age in place, and delay or eliminate the need for assisted living.

For residents who require a bit more assistance, our Care Home is an Assisted Living Facility (Adult Care Home) within the main building, so residents can remain active in the Pittsboro Christian Village community. The Care Home is staffed 24/7 with care providers to assist in Activities of Daily Living. The residents remain an integral part of the village family dining in our dining room, participating in village activities, and attending assembly meetings.

FEES:

	Low	High
Entrance Fees	\$30,000	\$115,000
Monthly Fees	\$1,235	\$1,735

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	64	63	87	98.4%
Assisted Living	27	23	23	85.2%
Nursing Beds:	0	0	0	0.0%
Total:	91	86	110	94.5%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 733 Plantation Estates Drive
City: Matthews
State: NC
Zip Code: 28105
Phone Number: (704) 845-5900
Fax Number: (704) 845-5443
Toll Free Number: (800) 582-4316
County: Mecklenburg
Web Page: www.actsretirement.org
Year Opened: 1988
Licensed Provider: ACTS Retirement - Life Communities, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Plantation Estates is a not-for-profit continuing care retirement community with 361 independent living apartments, 60 assisted living rooms, and 80 medical beds. The amenities and services of the community include a full service dining room, café and private dining room for entertaining guests, catering, library, game room, card room, fitness and exercise room with indoor pool and fitness instructor, home health care and on-site physician services, beauty shop, resident garden areas, on-site banking, twenty-four hour security staff, emergency call and response system, community chaplain, laundry service, general maintenance and repairs, transportation services, entertainment and bus trips. Also available on campus is a woodworking shop. The community is also accredited by CARF-CCAC.

FEES:

	Low	High
Entrance Fees	\$118,900	\$363,900
Monthly Fees	\$2,121	\$4,679

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	357	342	432	95.8%
Assisted Living	60	57	57	95.0%
Nursing Beds:	80	72	72	90.0%
Total:	497	471	561	94.8%

OTHER:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Units Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 1200 Porters Neck Road
City: Wilmington
State: NC
Zip Code: 28411
Phone Number: (910) 686-7181
Fax Number: (910) 686-4773
Toll Free Number: (800) 334-0240
County: New Hanover
Web Page: www.plantationvillagerc.com
Year Opened: 1988
Licensed Provider: Plantation Village, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Plantation Village is located on a 56 acre wooded site on Porters Neck Plantation, less than one-half mile from the Intercoastal Waterway, just northeast of the Wilmington city limits. The site has frontage on Porters Neck Road and is located on adjoining property to the Cornelia Nixon Davis Health Care Center (CND) and Champions at Porters Neck Assisted Living facility, along Champ Davis Road. The community has 90%, 50% and traditional refund contracts. Residents are entitled to lifetime access to the adjacent Champions Assisted Living or the Davis Health Care Center, or in alternate assisted living or health care facility which we own or with which we may contract to provide these services on an interim basis, if residents are no longer capable of living in their residence.

Toll Free Number outside of NC:
 (800) 334-0035.

FEES:

	Low	High
Entrance Fees	\$79,079	\$409,898
Monthly Fees	\$2,434	\$4,802

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	248	231	297	93.1%
Assisted Living	0	0	0	0.0%
Nursing Beds:	0	0	0	0.0%
Total:	248	231	297	93.1%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 155 Blake Boulevard
City: Pinehurst
State: NC
Zip Code: 28374
Phone Number: (910) 295-2294
Fax Number: (910) 295-2379
Toll Free Number:
County: Moore
Web Page: www.quailhavenvillage.com
Year Opened: 1986
Licensed Provider: Quail Haven of Pinehurst, LLC
Provider Tax Status: For-Profit

Self Description:

Quail Haven Village, located in Pinehurst, Quail Haven Village is part of the Liberty Healthcare group out of Wilmington, NC.

At Quail Haven Village, residents can enjoy a retirement lifestyle as active as they choose. A wealth of educational, cultural, social and spiritual activities are always available on campus. Many amenities and services are offered such as transportation to medical appointments and shopping, an on-site beauty & barbershop, a library, two activity centers, and 24-hour security, to name a few. Our attentive staff takes care of household and maintenance chores so residents have more time family, friends and their favorite activities. Residents enjoy the beautiful, restaurant-style dining room. Off campus, residents may enjoy the charm of the Pinehurst area with its world renowned golf facilities and landscape. Residents feel "at home" in the friendly, supportive environment of Quail Haven Village. For over 25 years, they have experienced independence and freedom along with peace of mind, knowing they are part of a caring community with a trusted reputation.

FEES:

	Low	High
Entrance Fees	\$10,000	\$10,000
Monthly Fees	\$2,596	\$4,472

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	73	66	78	90.4%
Assisted Living	0	0	0	0.0%
Nursing Beds:	0	0	0	0.0%
Total:	73	66	78	90.4%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1575 John Knox Drive
City: Colfax
State: NC
Zip Code: 27235
Phone Number: (336) 668-4900
Fax Number: (336) 668-4911
Toll Free Number: (888) 993-7677
County: Guilford
Web Page: www.riverlandingsr.org
Year Opened: 2003
Licensed Provider: The Presbyterian Homes, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

River Landing at Sandy Ridge, opened in 2003, is located on 152 acres of rolling woodland in a beautiful natural setting. Residents enjoy:

- Large cottages, villas, and townhomes with front porches, garages, golf cart ports, sunrooms and patios.
- Bright and spacious apartments with large windows, generous storage and walk-in closets.
- All residences have full kitchens with granite countertops, tile backsplashes and floors and stainless steel appliances. All rooms have crown molding and updated lighting. Each home and apartment is equipped with a washer and dryer and an emergency response system.
- A nine-hole golf course, tennis court, fishing ponds and miles of walking trails.
- State-of-the-art wellness and aquatic centers with upgraded locker rooms.
- Planned social, recreational, educational, cultural and spiritual activities.
- Private apartments in Assisted Living and private rooms in our 5-star, Medicare-certified Skilling Nursing Center with availability when and if it is needed, including recuperative days in the Health Care Center each year for every resident.
- A chapel, dining room, bistro, library, bank, hair salon, gift shop, putting green, woodworking shop, computer center, craft center and an outpatient clinic.
- A coach bus and four other buses to transport residents on day trips in the local area and longer trips further afield.

We focus on the eight dimensions of wellness through our enCompass program. Through enCompass, we provide opportunities that benefit resident's health and wellness.

River Landing's enLighten program is a unique and highly interactive type of lifelong learning. We bring museums, institutes, parks and universities from around the world to our campus via "face-to face" video conferences. Hundreds of organizations offer thousands of course offerings.

FEES:

	Low	High
Entrance Fees	\$118,000	\$329,000
Monthly Fees	\$2,709	\$3,988

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	298	289	419	97.0%
Assisted Living	56	53	54	94.6%
Nursing Beds:	60	57	57	95.0%
Total:	414	399	530	96.4%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1000 Salemtowne Drive
City: Winston-Salem
State: NC
Zip Code: 27106
Phone Number: (336) 767-8130
Fax Number: (336) 767-4090
Toll Free Number: (877) 767-8130
County: Forsyth
Web Page: www.salemtowne.org
Year Opened: 1972
Licensed Provider: Moravian Home Inc. (d/b/a Salemtowne)
Provider Tax Status: Not-For-Profit

Self Description:

Salemtowne is a non-profit, continuing care retirement community established by members of the Moravian Church in 1972 and is located on 115 acres in northwest Winston-Salem, near Historic Bethabara Park, Wake Forest University and vibrant shopping and dining venues.

Accommodations for independent living residents include 73 cottages in three distinct neighborhoods all with two bedrooms and 98 apartments in two distinct buildings with one and two-bedrooms.

Our Masten Assisted Living Center offers 46 licensed rooms which include studio rooms and suites and unlimited access to the full community. The Phillips Health Care Center includes 74 private rooms and 5 semi-private suites in a separate building with unlimited access to the full community. Within the Health Care Center, Salemtowne has a comprehensive, multi-disciplinary transitional rehabilitation program that specializes in short stay recovery after surgery and other illnesses. The program is Medicare certified.

The fitness center, staffed by a full-time wellness staff, includes an indoor pool and Jacuzzi and an exercise and weight room. The fitness center offers an array of programs to benefit beginner or advanced fitness levels.

Other community amenities include beauty/barber shops, full-time Chaplain, spacious dining rooms with all day dining, libraries, gift shops, craft rooms, a wood working shop, four acre lake and walking trails. Salemtowne is a "Quality First Community."

Salemtowne operates a continuing care at home program, Navigation by Salemtowne, which combines care coordination and a form of long term care insurance to allow an individual to remain in their home as long as they desire.

Expansion - Salemtowne is implementing a project that includes the construction of a new 100-bed skilled nursing and rehabilitation center with a new 20-bed assisted living memory support center. This new center will be built in a neighborhood configuration.

FEES:

	Low	High
Entrance Fees	\$30,000	\$305,000
Monthly Fees	\$1,550	\$4,050

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	170	160	183	94.1%
Assisted Living	46	34	28	73.9%
Nursing Beds:	84	80	80	95.2%
Total:	300	274	291	91.3%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 2200 Elm Avenue
City: Laurinburg
State: NC
Zip Code: 28352
Phone Number: (910) 277-2000
Fax Number: (910) 277-2025
Toll Free Number: (888) 728-8428
County: Scotland
Web Page: www.scotiavillage.org
Year Opened: 1988
Licensed Provider: The Presbyterian Homes, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Scotia Village, a nationally accredited, not-for-profit continuing care retirement community, is adjacent to St. Andrews University. Located on 66 beautiful acres with flowering trails and winding paths, Scotia Village is an affiliate of The Presbyterian Homes, Inc., a pioneer in the retirement industry since 1952. Many options for independent living include spacious apartments, garden apartments, villas and traditional-styled homes. Known for its small-town charm, Laurinburg won the prestigious "2003 All-American City" award.

- St. Andrews Institute of Lifelong Learning (SAILL) offers college courses taught on the Scotia Village campus throughout the year
- Traditional-styled homes with three bedrooms, nine-foot ceilings, two car garages
- Two and three bedroom garden apartments and villas
- One and two bedroom
- Exceptional housekeeping and maintenance services
- Variety of cultural experiences and activities
- Quality health center includes assisted living, skilled nursing, and memory loss care unit, all with private rooms
- Continuing Care Accreditation Commission (CARF-CCAC) accredited
- Within walking distance of St. Andrews University
- Close to North and South Carolina beaches
- Near the resort town of Pinehurst, the Golf Capital
- Fitness Center with indoor pool, weight room & aerobics room
- Multi-dimensional Wellness Program Encompass
- Active Resident's Association

FEES:

	Low	High
Entrance Fees	\$38,000	\$282,000
Monthly Fees	\$2,075	\$3,191

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	126	121	161	96.0%
Assisted Living	28	25	23	89.3%
Nursing Beds:	58	52	52	89.7%
Total:	212	198	236	93.4%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 17001 SearStone Drive
City: Cary
State: NC
Zip Code: 27513
Phone Number: (919) 234-0400
Fax Number: (919) 466-8988
Toll Free Number:
County: Wake
Web Page: www.searstone.com
Year Opened: 2013
Licensed Provider: Samaritan Housing Foundation, Inc. (d/b/a SearStone)
Provider Tax Status: Not-For-Profit

Self Description:

SearStone is built on 75 acres of former family farm land located in the heart of Western Cary. The community has transformed the natural land into a mix of public and private spaces for residents to enjoy. The 4.5-acre lake and abundant wooded space provide several different walking trails where residents might come across a mother walking her baby or local joggers. Within easy walking distance to local shops, grocery stores and restaurants, SearStone is a new urbanist community providing residents with convenience and independence for the adult who doesn't want to be secluded from the rest of the world. Winston Clubhouse provides the indoor common areas for residents and includes a Medical Clinic, heated indoor pool and spa, fitness center, group fitness room, salon and massage area, library and business center, living room, multi-purpose activities room, White Horse Bar & Grill, Casual Dining, Private Dining and Fine Dining restaurants, Billiards room, The Clydesdale card room, Conference Room and Grand Ballroom. Several different residence styles are provided from one-bedroom apartments to Lakeside Flats to Estate Homes.

Residents enjoy a host of cultural arts and activities including visiting special exhibits at the NC Museum of Art, taking a chocolate-making class, learning how to make artisan bread, weekly cocktail hours and regular trips to professional and college sporting events. Our full-time Wellness Director keeps everyone up and moving with yoga classes, aqua Pilates and one-on-one personal training programming. Our residents move from Cary but are from all over the world, making SearStone a welcoming home. Once here residents find the SearStone Resident Association to help guide them in making friends that will last a lifetime.

FEES:

	Low	High
Entrance Fees	\$320,000	\$835,000
Monthly Fees	\$2480	\$5,700

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input checked="" type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	169	154	229	91.1%
Assisted Living	8	8	8	100.0%
Nursing Beds:	16	16	16	100.0%
Total:	193	178	253	92.2%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 5100 Sharon Road
City: Charlotte
State: NC
Zip Code: 28210
Phone Number: (704) 553-1670
Fax Number: (704) 553-1877
Toll Free Number:
County: Mecklenburg
Web Page: www.sharontowers.org
Year Opened: 1969
Licensed Provider: The Presbyterian Homes at Charlotte, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Sharon Towers is nestled on 28 wooded acres in Charlotte's SouthPark area. Founded in 1969, our not-for-profit continuing care retirement community provides well over 200 independent accommodations (including cottages), as well as approximately 40 assisted living units and a Health Care Center for skilled nursing care. Most residential buildings are connected, and the almost three dozen cottages lining the perimeter of the campus are only a short walk away.

The wide range of services provided include weekly housekeeping with bed and bath linen exchange, utilities, telephone, wi-fi, cable hookup, 24 hour security and emergency assistance, a flexible meal plan, and individual and group transportation. An aquatics center, exercise room, walking paths, beauty and barber services, on-site drugstore, private formal dining room, guest accommodations, extensive library, computer resource room, woodworking shop, arts and crafts studios, billiards, and a wide variety of recreational and other activities are included in the amenities offered at Sharon Towers.

FEES:

	Low	High
Entrance Fees	\$35,000	\$437,716
Monthly Fees	\$2,279	\$4,484

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	193	183	225	94.8%
Assisted Living	40	38	38	95.0%
Nursing Beds:	96	59	59	61.5%
Total:	329	280	322	85.1%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 4009 Craig Avenue
City: Charlotte
State: NC
Zip Code: 28211
Phone Number: (704) 365-7190
Fax Number: (704) 365-5466
Toll Free Number:
County: Mecklenburg
Web Page: www.whiteoakindependentliving.com
Year Opened: 1983
Licensed Provider: White Oak Manor - Charlotte, Inc.
Provider Tax Status: For-Profit

Self Description:

Sharon Village is situated in a peaceful neighborhood of tree-lined streets and lovely homes, a tranquil retreat with quick and easy access to all that Charlotte has to offer. Our spacious floor plans range from efficiency, one bedroom, one bedroom deluxe and two bedroom designs with fully equipped kitchens and screened-in porches. We offer our residents all of our amenities and services for one all inclusive price. The management team plans stimulating and entertaining activities for you to enjoy at the community as well as outside excursions and tours to satisfy everyone's taste. Emergency call systems are located in each apartment, monitored 24 hours a day by a Licensed Nurse at the adjacent White Oak of Charlotte Skilled Nursing Facility for additional peace of mind. Sharon Village is more than an affordable, luxury retirement community. It's a place to enjoy life as it was meant to be-in style!

FEES:

	Low	High
Entrance Fees	\$17,000	\$30,000
Monthly Fees	\$1050	\$1,915

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	33	33	35	100.0%
Assisted Living	0	0	0	0.0%
Nursing Beds:	180	155	155	86.1%
Total:	213	188	190	88.3%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 8919 Park Road
City: Charlotte
State: NC
Zip Code: 28210
Phone Number: (704) 551-6800
Fax Number: (704) 551-6868
Toll Free Number:
County: Mecklenburg
Web Page: www.southminster.org
Year Opened: 1987
Licensed Provider: Southminster, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Founded with pride by two local churches, Southminster is a non-profit continuing care retirement community that embraces the individual, fostering a quality of life characterized by choice, independence, well-being, spirituality, dignity, privacy, and peace of mind for each person.

Southminster is conveniently located just south of the thriving Charlotte Uptown in an area simply described as "South Charlotte" on 25 beautifully landscaped acres near world-class shopping, entertainment, and healthcare. Residents enjoy a wide range of convenience services including housekeeping, linen service, maintenance, 24-hour emergency medical response, security, scheduled shopping and medical transportation, a flexible dining plan, and a full range of cultural, recreational, and social activities. With easily accessible amenities all under one roof, residents enjoy a state-of-the-art wellness center, an on-site credit union, convenience store and pharmacy, arts & crafts studio, woodworking shop, hair salon, library, computer lab, art studio, billiards room, guest rooms, multi-purpose event rooms for large and small gatherings, and smaller private rooms for playing cards, games and socializing.

With its recent expansion and renovation, Southminster now boasts 257 independent residences and a modern wellness center with heated indoor pool, exercise gym, and an aerobics room. Residents have the option of dining formally in the upscale Promenade Room or more casually in The Oak Leaf Grille. Other new amenities include a stadium-seat theatre, fully-licensed pub, and a chapel. Residents receiving assisted, memory care or skilled nursing enjoy accommodations and programs designed to promote comfort, security, dignity and self-determination. In 2013, Southminster added a fully licensed home care services provider, Embrace Care, to its full continuum of care.

Southminster is nationally accredited by the CARF/CCAC Continuing Care Accreditation.

FEES:

	Low	High
Entrance Fees	\$43,000	\$744,000
Monthly Fees	\$2,591	\$4,713

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	257	253	320	98.4%
Assisted Living	25	24	24	96.0%
Nursing Beds:	60	41	41	68.3%
Total:	342	318	385	93.0%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1500 Sawmill Road
City: Raleigh
State: NC
Zip Code: 27615
Phone Number: (919) 848-7000
Fax Number: (919) 848-7392
Toll Free Number:
County: Wake
Web Page: www.springmoor.org
Year Opened: 1984
Licensed Provider: Springmoor, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

As a CARF/CCAC nationally accredited life care retirement community, Springmoor is designed to provide active, independent retirement living, while providing for existing and future health and personal needs. Situated on beautifully landscaped grounds, meandering pathways provide a serene setting for the many houses, villas, and apartments on the forty-two acre campus.

Springmoor is ideally located in Raleigh, the capital of North Carolina, a short trip from the beach and the mountains. The area is consistently rated as one of the best places to live in the United States. Maintenance free living combines with easy access to a wide variety of universities, hospitals, shopping, cultural, sports, churches and almost anything else you desire.

The amenities and services, including the scheduled activities, entertainment, and extensive PATHWAYS wellness program, are among the best and most progressive offered by any continuing care retirement community. Springmoor also offers their own Springmoor Home Care and Supportive Living as a bridge between independent living and more continuous care. All of this and more allows for an active, yet secure retirement lifestyle.

Springmoor's onsite Stewart Health Center provides short term and continuing inpatient care including memory care, as well as a comprehensive outpatient clinic. Residents may also receive physical and occupational therapy on site, as well as dental, optical, hearing, and psychiatric and podiatry care. The standard for care assures that the resident receive nursing care and personal care that is among the best available in the state of North Carolina and beyond.

Note: According to management, occupancy percentage for nursing beds listed on this page may be misleading due to individuals who may have chosen a private room. When private rooms are selected, nursing beds may be made unavailable for occupancy. The calculation done by the North Carolina Department of Insurance does not account for this situation. If needed, please contact the community for more accurate nursing bed occupancy percentages.

FEES:

	Low	High
Entrance Fees	\$93,500	\$379,000
Monthly Fees	\$2,368	\$4,121

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input checked="" type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	391	369	427	94.4%
Assisted Living	18	17	17	94.4%
Nursing Beds:	173	118	118	68.2%
Total:	582	504	562	86.6%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 514 Old Mt. Holly Road
City: Stanley
State: NC
Zip Code: 28164
Phone Number: (704) 263-1986
Fax Number: (704) 263-8959
Toll Free Number:
County: Gaston
Web Page: www.stanleytotallivingcenter.org
Year Opened: 1983
Licensed Provider: Stanley Total Living Center, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Stanley Total Living Center, Inc. is a not-for-profit Continuing Care Retirement Community offering independent apartments, assisted living, and skilled nursing care. The mission is "A Ministry of Compassion" and staff strive to follow the vision in which it is "a place where every person in their wisdom years has the right to dignity and respect".

FEES:

	Low	High
Entrance Fees	\$0	\$32,000
Monthly Fees	\$2,172	\$3,995

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|--|---|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input checked="" type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	29	25	31	86.2%
Assisted Living	24	24	24	100.0%
Nursing Beds:	106	104	104	98.1%
Total:	159	153	159	96.2%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 100 Cedar Club Circle
City: Chapel Hill
State: NC
Zip Code: 27517
Phone Number: (919) 259-7000
Fax Number: (919) 259-7930
Toll Free Number: (877) 433-3669
County: Durham
Web Page: www.cedarsofchapelhill.com
Year Opened: 2004
Licensed Provider: The Cedars of Chapel Hill, LLC/
 The Cedar of Chapel Hill Club, Inc.
Provider Tax Status: For-Profit/Not-For Profit

Self Description:

The Cedars of Chapel Hill is located on a 50 acre campus near the University of North Carolina and within the 435 acre mixed use development of Meadowmont. The community consists of a 40,000 square foot clubhouse, DuBose Health Center, 11 multi-family residential buildings and 49 single family cottages. Homes range in size from 980 square feet to almost 3,500 square feet.

The Cedars is a residential condominium development owned by the Members who enter into a Membership Agreement and receive services through The Cedars Club. All sales of homes are priced individually by their owners based upon the current market value and custom modifications.

Each Cedars Member pays a monthly fee based on the type of home purchased, entitling the Member to a package of service and amenities. The services include 24-hour security, utilities & insurance, dining program, weekly housekeeping and linen service, transportation, activities and wellness programs. This package also includes a healthcare benefit of 90 days of residency in Dubose Health Center and after 90 days a significantly reduced daily rate. The amenities include an indoor pool, fitness center, billiards room, library, ballroom, bank, woodworking shop and art studio. The dining venues include a lounge, The Garden Room for informal dining and The Magnolia Room for formal dining. Takeout and delivery meal service is provided at no additional fee.

FEES:

	Low	High
Entrance Fees	Equity Purchase	Equity Purchase
Monthly Fees	\$2,672	\$5,898

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input checked="" type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	306	305	402	99.7%
Assisted Living	4	4	4	100.0%
Nursing Beds:	44	42	42	95.5%
Total:	354	351	448	99.2%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 3442 Cypress Club Drive
City: Charlotte
State: NC
Zip Code: 28210
Phone Number: (704) 714-5500
Fax Number: (704) 714-5501
Toll Free Number: (800) 643-1665
County: Mecklenburg
Web Page: www.thecypress.com
Year Opened: 1999
Licensed Provider: The Cypress of Charlotte Club, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

The Cypress of Charlotte is located near South Park on a gated 62 acre campus. The community consists of a 40,000 square foot clubhouse, five mid-rise luxury condominium villa buildings, 53 free standing cottages, and a 60 bed skilled nursing facility. Square footages range from 810 sq. ft. to 3800 sq. ft.

Members purchase and own their own homes and enjoy the opportunity for appreciation and equity build-up in our debt-free community.

Members enjoy dining in the Clubhouse and receive 30 meals per month, weekly housekeeping, complete home maintenance, utilities, transportation, security, and wide-ranging activities.

FEES:

	Low	High
Entrance Fees	Equity Purchase	Equity Purchase
Monthly Fees	\$2,206	\$3,964

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input checked="" type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	310	310	412	100.0%
Assisted Living	4	4	4	100.0%
Nursing Beds:	56	51	51	91.1%
Total:	370	365	467	98.6%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 8801 Cypress Lakes Drive
City: Raleigh
State: NC
Zip Code: 27615
Phone Number: (919) 870-9007
Fax Number: (919) 518-8970
Toll Free Number: (888) 876-9007
County: Wake
Web Page: www.thecypressofraleigh.com
Year Opened: 2008
Licensed Provider: The Cypress of Raleigh Club, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

The Cypress of Raleigh is located at Strickland Road and Lead Mine Road in North Raleigh on a 48 acre campus. Currently the community consists of a 42,000 square foot clubhouse, 3 mid-rise luxury condominium villa buildings, 37 free standing cottages. Square footages range from 813 sq. ft. to 2,779 sq. ft. In addition, there is a 40 bed Health Center with SNF and AL beds.

The Cypress of Raleigh is a residential condominium development owned by cottage owners and villa owners who enter into a Membership Agreement. All future sales of cottages and villas will be priced individually by their owners and/or estates based upon current market values and any custom upgrades and other modifications to their home.

FEES:

	Low	High
Entrance Fees	Equity Purchase	Equity Purchase
Monthly Fees	\$2,292	\$4,205

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input checked="" type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	205	205	283	100.0%
Assisted Living	4	3	3	75.0%
Nursing Beds:	36	31	31	86.1%
Total:	245	239	317	97.6%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 2701 Pickett Road
City: Durham
State: NC
Zip Code: 27705
Phone Number: (919) 490-8000
Fax Number: (919) 490-0887
Toll Free Number: (800) 474-0258
County: Durham
Web Page: www.forestduke.org
Year Opened: 1992
Licensed Provider: The Forset at Duke, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Accredited by CARF/CCAC, Fitch rated, and neighbor to the Duke University campus and medical center, The Forest at Duke has provided outstanding retirement living for over 20 years. From its central NC location, a quick drive reaches other nationally recognized educational and medical centers, major shopping venues, Research Triangle Park and the RDU International airport.

Maintenance free independent living is available in 11 styles of apartments and cottages on the 47 acre campus. The 40,000 sq. ft. Community Center features multiple dining venues, a well-stocked library, a billiards room, an auditorium, bank, beauty shop, arts studio, and other village amenities. Residents enjoy an indoor aquatics and fitness center with full time staff, outdoor walking trails, greenhouse, gardening plots, and a fish stocked pond. A wide array of on-campus cultural, educational and wellness programs are a highlight of community life. The Forest serves as a host site for the Osher Lifelong Learning Institute (OLLI) at Duke.

The Medicare certified Health and Wellness Center offers Duke directed on site health services including primary medical care, physical, occupational and speech therapies, respite care, apartment style assisted living, private room skilled nursing, memory support and dementia care residences. Three distinctly different garden areas offer health center residents attractive and secure outdoor opportunities.

Greater Durham community outreach includes major supporting partnerships with the Durham Center for Senior Life, Senior PharmAssist, Urban Ministries and Rogers-Herr Middle School. Annually, 72,000 resident and staff volunteer hours benefit many other local nonprofit organizations, Duke Hospital, Duke Gardens, and the Nasher Museum.

FEES:

	Low	High
Entrance Fees	\$87,900	\$508,000
Monthly Fees	\$2,889	\$5,302

Note:

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- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	255	239	310	93.7%
Assisted Living	34	28	28	82.4%
Nursing Beds:	58	53	53	91.4%
Total:	347	320	391	92.2%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 3700 Taylor Glen Lane
City: Concord
State: NC
Zip Code: 28027
Phone Number: (704) 788-6510
Fax Number: (704) 788-6508
Toll Free Number:
County: Cabarrus
Web Page: www.taylorglencommunity.org
Year Opened: 2002
Licensed Provider: Baptist Retirement Homes of North Carolina, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Located on 100+ beautifully landscaped acres in Concord, The Gardens of Taylor Glen is Metrolina's premiere Continuing Care Retirement Community. The community offers a choice of 125 independent living apartments. Residents choose from one or two bedroom apartments equipped with an emergency response system and 24 hour gated security. Each apartment has individual washers and dryers. The Community also includes 24 spacious Assisted Living apartments that are all private. Twelve of those units serve residents with dementia as a Memory Enhanced Residence with an enclosed Memory Garden. The Health Care Center has 24 private rooms arranged in 3 "neighborhoods". The Gardens of Taylor Glen's central Plaza building houses the formal Dining Room as well as the Café and Private Dining Room. Also located in the Plaza are the Medical Clinic, Auditorium, Post Office, Beauty/Barber shop, Card Room, Billiards Room, Indoor pool and Fitness center, Full-service Bank, Music Room, Library/Computer room, Massage therapy, Convenience store, wood working shop and more. Walking trails located on the property are complimented by a lake and gazebo. Individual garden plots are also available to residents.

FEES:

	Low	High
Entrance Fees	\$44,295	\$168,219
Monthly Fees	\$1,854	\$4,409

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	125	87	105	69.6%
Assisted Living	24	17	17	70.8%
Nursing Beds:	24	15	15	62.5%
Total:	173	119	137	68.8%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 501 East Whitaker Mill Road
City: Raleigh
State: NC
Zip Code: 27608
Phone Number: (919) 839-5604
Fax Number: (919) 839-5604
Toll Free Number:
County: Wake
Web Page: www.whitakerglen.com
Year Opened: 1984
Licensed Provider: Whitaker Glen, Inc.
Provider Tax Status: For-Profit

Self Description:

Located on a beautiful, oak tree-lined campus inside the I-440 beltline, the independent living component of Whitaker Glen has three, four story apartment buildings with sky-lit atriums all connected to the Activity Center by enclosed, climate controlled breezeways. Spacious 1 and 2 bedroom apartments offer residents full kitchens, washer/dryer, patio/balcony and an emergency call system. Services include security, activities, transportation, 24 hour nursing services, fitness center, movie theatre, coffee shop, convenience store, greenhouse, community garden, library, spa and massage retreat. After hour needs and skilled nursing care is provided by our 5 star skilled nursing center, The Oaks at Mayview.

FEES:

	Low	High
Entrance Fees	\$58,000	\$134,000
Monthly Fees	\$2,642	\$3,485

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	96	81	91	84.4%
Assisted Living	0	0	0	0.0%
Nursing Beds:	135	111	111	82.2%
Total:	231	192	202	83.1%

OTHER:

- | | |
|---|---|
| <input type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 400 Avinger Lane
City: Davidson
State: NC
Zip Code: 28036
Phone Number: (704) 896-1100
Fax Number: (704) 896-1119
Toll Free Number:
County: Mecklenburg
Web Page: www.thepinesatdavidson.org
Year Opened: 1988
Licensed Provider: The Pines at Davidson, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

The Pines at Davidson is located on a 100-acre wooded campus, near a residential section of this vibrant college town. Main buildings are connected by enclosed corridors, and cottages and villas are within easy walking distance. The community center features an elegant dining room, library, bank, arts and crafts room, multi-purpose room, TV and game room, beverage lounge, café, formal living room, billiards room, beauty/barber shop, post office and chapel. Also available on campus are a woodworking shop, a Wellness Center which includes a registered nurse and dietitian, Exercise Rooms and a Warm Water Therapy Facility (24' x 50' pool plus spa whirlpool). Apartments range up to 1249 square feet; cottages range from 1200 -1565 square feet. Our villas are 1,429 to 1,870 square feet. Residents may audit courses at nearby Davidson College, or attend concerts, lectures, or varsity sporting events. Residents also have a paid-in-full membership at nearby River Run Golf & Country Club.

FEES:

	Low	High
Entrance Fees	\$42,800	\$327,100
Monthly Fees	\$2,165	\$3,760

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	225	219	281	97.3%
Assisted Living	30	29	29	96.7%
Nursing Beds:	51	51	51	100.0%
Total:	306	299	361	97.7%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 1860 Brookwood Avenue
City: Burlington
State: NC
Zip Code: 27215
Phone Number: (336) 570-8400
Fax Number: (336) 570-8460
Toll Free Number: (800) 282-2053
County: Alamance
Web Page: www.villageatbrookwood.org
Year Opened: 2003
Licensed Provider: Alamance Extended Care, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

The Village at Brookwood is nestled on a 50-acre campus between Burlington's historic district and Elon University. The community has a casual and elegant lifestyle in an intimately sized community close to major airports and highways. The Village at Brookwood offers extensive, fee for service agreements and refund options.

Elon University's close proximity and easy access brings a diverse social, educational and cultural mix to the Burlington and Brookwood community.

The Village at Brookwood offers 5 different apartment plans and 4 distinct cottage plans. All cottages are free standing and have attached carports. All apartments have balconies and are connected to the Village Center by climate-controlled pathways.

The Village is sponsored by Alamance Regional Medical Center and in 2013 affiliated with Cone Health, a regional Health Care System. This affiliation has ensured Brookwood is one of the highest ranked (by The Joint Commission) long-term care providers in the nation.

"You're among friends at The Village at Brookwood."

FEES:

	Low	High
Entrance Fees	\$85,400	\$493,300
Monthly Fees	\$1,791	\$3,904

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	151	139	181	92.1%
Assisted Living	24	22	22	91.7%
Nursing Beds:	85	75	75	88.2%
Total:	260	236	278	90.8%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 728 Klumac Road
City: Salisbury
State: NC
Zip Code: 28144
Phone Number: (704) 633-1002
Fax Number: (704) 636-5038
Toll Free Number: (800) 610-0783
County: Rowan
Web Page: www.trinityoaks.net
Year Opened: 1993
Licensed Provider: Lutheran Retirement Center - Salisbury, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Trinity Oaks is a nonprofit continuing care retirement community sponsored by Lutheran Services Carolinas in historic Salisbury, North Carolina. Access to local history and culture, combined with a multitude of services and amenities, make for an invigorating yet carefree lifestyle. Residents can enjoy an active retirement in one of 42 cottage homes that feature spacious floor plans, nine-foot ceilings, and an array of architectural enhancements. Four apartment floor plans offer privacy with easy access to our wellness center, dining areas and on-campus activities. An updated wellness center, café/bistro and enhanced common areas in the main apartment building, as well as a memory care program, complete this truly 21st century retirement community.

Salisbury is known for its lively downtown, arts offerings, and distinct seasons. With three colleges, a seminary, local symphony and theater options, as well as proximity to three interstate highways and two international airports, Salisbury offers big-city living with a small-town flavor. Trinity Oaks residents enjoy intellectual and cultural pursuits just minutes from the 42-acre campus, as well as regular trips to statewide and regional attractions. The Salisbury VA Medical Center is also just minutes away and provides state-of-the-art care for qualified veterans.

Location, affordability, cultural opportunities and a vibrant campus life make Trinity Oaks the right choice for retirement living in Piedmont North Carolina.

FEES:

	Low	High
Entrance Fees	\$56,650	\$393,975
Monthly Fees	\$1,761	\$3,043

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|---|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	177	130	161	73.4%
Assisted Living	45	42	42	93.3%
Nursing Beds:	115	111	111	96.5%
Total:	337	283	314	84.0%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 617 Laurel Lake Drive
City: Columbus
State: NC
Zip Code: 28722
Phone Number: (828) 894-3000
Fax Number: (828) 894-2959
Toll Free Number: (800) 633-2718
County: Polk
Web Page: www.actsretirement.org
Year Opened: 1992
Licensed Provider: ACTS Retirement - Life Communities, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Tryon Estates at Columbus is situated in a suburban location on 200+ acres in Polk County, North Carolina.

The facility contains 274 apartments and 10 villas ranging in size from a one bedroom apartment to a three bedroom villa. There are 44 assisted living suites and 52 skilled nursing beds, including a 19 bed special care unit for dementia related conditions. The community is also accredited by CARF-CCAC.

FEES:

	Low	High
Entrance Fees	\$127,900	\$610,900
Monthly Fees	\$2,246	\$3,423

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input checked="" type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	270	215	307	79.6%
Assisted Living	44	40	40	90.9%
Nursing Beds:	52	39	39	75.0%
Total:	366	294	386	80.3%

OTHER:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 3701 Wade Coble Drive
City: Burlington
State: NC
Zip Code: 27215
Phone Number: (336) 538-1500
Fax Number: (336) 538-1504
Toll Free Number:
County: Alamance
Web Page: www.twinlakescomm.org
Year Opened: 1983
Licensed Provider: Lutheran Retirement Ministries of Alamance County, North Carolina
Provider Tax Status: Not-For-Profit

Self Description:

Twin Lakes Community is a nationally accredited CCRC designed for those who desire to live with real purpose; where residents live, learn and grow at a place where community comes first. Located in the heart of NC on over 210 acres, we offer 400 independent living choices, including apartments, villas and free-standing homes with attached garages. Twin Lakes Community's continuous arc of care includes Deacon Pointe Assisted Living, Coble Creek Skilled Nursing, Moneta Springs Memory Care, therapy and rehabilitation services, a home care agency and an adult day program. Both Moneta Springs and Coble Creek consistently maintain the highest rating of 5 stars and both use specialized therapies to ensure a high quality of life and care for our residents.

Residents at Twin Lakes enjoy a beautiful heated indoor pool, a fitness center, two restaurants, two large gathering spaces, a library, theater, hair salon, community garden, art studio, gift shop, and woodworking shop. Abundant social activities are part of residents' daily lives, and with over fifty resident-led clubs and affinity groups active on campus, there is something for everyone. Two-thirds of our residents currently participate in Thrive®, our dynamic wellness program dedicated to residents' pursuit of optimum wellness and successful aging. Under the direction of a specially-trained, experienced wellness director the program engages each participant in a customized program designed to meet the participant's unique wellness needs and goals, engaging residents in the life-long process of growing in mind, body, and human spirit.

Twin Lakes is located in the Town of Elon on the western edge of Burlington, with easy access to Interstate 40/85. We are midway between the NC beaches and mountains and close to the campuses and affiliated teaching hospitals of Duke University, UNC and Wake Forest University. Nearby Elon University allows residents to enjoy the educational and cultural benefits of a university town. While we are affiliated with the Lutheran Church, our residents come from a rich diversity of religious, professional, racial and geographic backgrounds. The unifying characteristic of our residents is their generosity of spirit – with each other and with the broader community. Our staff and residents together donated more than 15,000 hours of community service during the past year, and we are proud to have built four houses for Habitat for Humanity and to have collected more than 100 tons of food for hungry people in our county. Twin Lakes is an extended family defined by our shared sense of purpose, generosity, and progression.

FEES:

	Low	High
Entrance Fees	\$55,000	\$341,000
Monthly Fees	\$1,388	\$2,637

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input checked="" type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	393	358	508	91.1%
Assisted Living	56	47	47	83.9%
Nursing Beds:	116	107	107	92.2%
Total:	565	512	662	90.6%

OTHER:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 4100 Well Spring Drive
City: Greensboro
State: NC
Zip Code: 27410
Phone Number: (336) 545-5400
Fax Number: (336) 545-5411
Toll Free Number: (800) 547-5387
County: Guilford
Web Page: www.well-spring.org
Year Opened: 1993
Licensed Provider: Well-Spring Retirement Community, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Well-Spring is a market leading lifecare community which provides residents with a level of financial reassurance. Well-Spring's lifecare contract serves as a shield against the catastrophic costs of long term care and is a means of asset preservation. A Modified Lifecare contract is also available, which offers lower entrance fees and monthly service fees and is specifically designed for individuals who have already purchased long term care insurance or prefer to protect their future with other assets.

Well-Spring residents enjoy exceptional retirement living with a diverse mix of social activities that provide opportunities for enrichment. Well-Spring's collaboration with the University of North Carolina at Greensboro provides lectures, concerts, recitals as well as the opportunity to enroll in or audit classes. Accredited since 2003 by the Commission on Accreditation of Rehabilitation Facilities/Continuing Care Accreditation Commission (CARF/CCAC), Well-Spring is located just off of Drawbridge Parkway, west of Battleground Avenue (220N).

FEES:

	Low	High
Entrance Fees	\$78,340	\$396,300
Monthly Fees	\$2,460	\$4,948

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input checked="" type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input checked="" type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input type="checkbox"/> Rental (No Entrance Fee)	<input checked="" type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	238	234	285	98.3%
Assisted Living	71	61	61	85.9%
Nursing Beds:	60	60	60	100.0%
Total:	369	355	406	96.2%

OTHER:

- | | |
|---|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Undergoing Expansion |

Address: 1000 Wesley Pines Road
City: Lumberton
State: NC
Zip Code: 28358
Phone Number: (910) 738-9691
Fax Number: (910) 738-8905
Toll Free Number:
County: Robeson
Web Page: www.wesleypines.org
Year Opened: 1977
Licensed Provider: United Methodist Retirement Homes, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Peacefully located on 49 acres, Wesley Pines is perfectly situated amongst towering pine trees in Lumberton, North Carolina. Within a ninety minute radius, you can enjoy the beaches of N.C. and S.C., the quaint golfing and shopping haven of Pinehurst, and the cultural and shopping opportunities of our capital city of Raleigh. An added benefit is the close proximity to the University of North Carolina at Pembroke and the many sports, cultural and educational opportunities it affords.

Owned by United Methodist Retirement Homes, Inc. and managed by Life Care Services, LLC. Wesley Pines is Robeson County's only continuing care retirement community. Wesley Pines is proud to share that several departments have been awarded some of the highest recorded resident satisfaction awards in LCS managed communities across the United States. The community has also been awarded The Robesonian's Reader's Choice award winner for Best Retirement Community for the past several years.

Residents feel "at-home" in the warm, relaxed environment of Wesley Pines. For nearly 40 years, they have experienced independence and freedom along with peace of mind, knowing they are part of a caring community with a trusted reputation. Our laid-back atmosphere encourages residents to live their retirement on their own terms. A day may include lacing up dancing shoes for line dancing demonstrations in the morning and a round of golf at a nearby course in the afternoon. Others may become engrossed in the latest best-selling book from our on-campus library, host a bridge or book club, participate in a creative writing class, or take a stroll under the tall pines along our community's many walking paths.

We are here to provide a fulfilling retirement that allows flexibility and independence for your day's schedule which is why we encourage you to get to know Wesley Pines.

FEES:

	Low	High
Entrance Fees	\$62,773	\$328,828
Monthly Fees	\$2,370	\$3,140

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input checked="" type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input checked="" type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	22	17	23	77.3%
Assisted Living	36	34	36	94.4%
Nursing Beds:	62	56	56	90.3%
Total:	120	107	115	89.2%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input checked="" type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 70 Oak Street
City: Tryon
State: NC
Zip Code: 28782
Phone Number: (828) 859-5871
Fax Number: (828) 859-2073
Toll Free Number:
County: Polk
Web Page: www.whiteoakindependentliving.com
Year Opened: 1975
Licensed Provider: White Oak Manor - Tryon, Inc.
Provider Tax Status: For-Profit

Self Description:

This is The Time Of Your Life. Enjoy It!

Nestled in the foothills of the breathtaking Blue Ridge Mountains, White Oak Village is conveniently located in the quaint town of Tryon. This unique area of North Carolina, fondly known as "horse country" is home to a variety of annual events. Tryon, an established haven for the arts, is renowned for its cultural events, art galleries, local live theatre performances and music festivals. Surrounded by natural beauty, Tryon is a destination for hikers, bikers, fly fishers, and kayakers, and is one of the premier spots from which to observe the spectacular fall foliage display. The medical care in this area is of the highest caliber. St. Luke's Hospital is located minutes away and Tryon boasts a wide range of medical specialists who are noted as leaders in their field. Of course, should it be necessary, medical facilities in Greenville/Spartanburg, SC and Asheville, NC are about forty-five minutes away. With independent living apartments, assisted living, skilled nursing and short-term rehab, all on the same campus, White Oak Village-Tryon is a vibrant, exciting community where friends are plentiful, responsibilities are few and boredom is never an option!

FEES:

	Low	High
Entrance Fees	\$0	\$30,000
Monthly Fees	\$1300	\$1,540

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:	Entrance Fee Refund
<input type="checkbox"/> Extensive	<input type="checkbox"/> No Refund
<input type="checkbox"/> Modified	<input checked="" type="checkbox"/> Fully Declining Refund
<input checked="" type="checkbox"/> Fee for Service	<input type="checkbox"/> 50% Refund
<input type="checkbox"/> Equity	<input type="checkbox"/> 80% Refund
<input checked="" type="checkbox"/> Rental (No Entrance Fee)	<input type="checkbox"/> 90% Refund
<input type="checkbox"/> Assignment of Assets	<input type="checkbox"/> Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	100	97	112	97.0%
Assisted Living	23	20	20	87.0%
Nursing Beds:	70	64	64	91.4%
Total:	193	181	196	93.8%

OTHER:

- | | |
|--|---|
| <input type="checkbox"/> Dementia Units Available | <input checked="" type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input checked="" type="checkbox"/> Direct Admission to Nursing | <input type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Address: 700 South Holden Road
City: Greensboro
State: NC
Zip Code: 27407
Phone Number: (336) 299-0031
Fax Number: (336) 547-2999
Toll Free Number: (888) 558-6574
County: Guilford
Web Page: www.liveatwhitestone.org
Year Opened: 1913
Licensed Provider: The Masonic and Eastern Star Home of North Carolina, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

Established in 1912, WhiteStone: A Masonic and Eastern Star Community is the oldest senior living home in the state of North Carolina. The continuing care retirement community is centrally located in Greensboro and offers seniors a wide array of services and amenities designed to meet their unique needs while allowing them the freedom to pursue their personal interests. Whitestone is licensed by the State as a Continuing Care Retirement Community, which includes Medicare and Medicaid Certification which offers Independent, Assisted Living, Home Care, and Medicare and Medicaid certified Nursing levels of care.

FEES:

	Low	High
Entrance Fees	\$50,000	\$472,500
Monthly Fees	\$2,259	\$2,732

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:**Contract Options:**

- Extensive
- Modified
- Fee for Service
- Equity
- Rental (No Entrance Fee)
- Assignment of Assets

Entrance Fee Refund

- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	162	152	202	93.8%
Assisted Living	12	12	12	100.0%
Nursing Beds:	88	80	80	90.9%
Total:	262	244	294	93.1%

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List on (some or all) Units
- Residents on the Board of Directors
- Housekeeping (some or all) in Monthly Fees
- Meals (some or all) in Monthly Fees
- Medicaid Certified
- Medicare Certified
- Pets (some) Allowed
- Emergency Call System
- Swimming Pool/Spa/Sauna
- Transportation Available
- Exercise Room or Programs
- Undergoing Expansion

Address: 1221 Broad Street
City: Fuquay-Varina
State: NC
Zip Code: 27526
Phone Number: (919) 552-4580
Fax Number: (919) 552-4979
Toll Free Number: (800) 552-0213
County: Wake
Web Page: www.windsorpoint.com
Year Opened: 1998
Licensed Provider: Windsor Point, Inc.
Provider Tax Status: For-Profit

Self Description:

Windsor Point is located at the intersection of Highway 55 and Wilbon Road on 17 acres in the heart of Fuquay-Varina. Windsor Point is beautifully decorated and boasts attractive English brick and stucco architecture, but the atmosphere is relaxed and easy-going.

Not only does Windsor Point have all levels of care, but the 22,000 square foot community center features amenities such as a dining room, community store, pharmacy, library, coffee lounge, arts and craft room, billiards room, a multi-purpose auditorium, and a hair salon. Windsor Point is convenient to shopping, recreation facilities, and major medical centers. Our wellness center has a heated indoor pool, spa, exercise room, and a sunny garden room with a terrace. Some of the services we provide are dining, planned activities, security, emergency assistance, housekeeping, grounds keeping, maintenance, and scheduled transportation. Windsor Point is Medicare-approved and locally owned and managed by a family that has spent over 45 years in North Carolina's health care industry.

Lower entrance fees are available for healthcare admissions.

FEES:

	Low	High
Entrance Fees	\$58,000	\$228,000
Monthly Fees	\$2,149	\$3,068

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison
- Actual fees may vary from those listed.
- Fees listed are for single occupancy, additional fees may apply for a second resident.
- Please contact the facility for a more detailed list of entrance and monthly fees.

CONTRACT AND REFUND OPTIONS:

Contract Options:

Entrance Fee Refund

- | | |
|---|--|
| <input type="checkbox"/> Extensive | <input type="checkbox"/> No Refund |
| <input checked="" type="checkbox"/> Modified | <input checked="" type="checkbox"/> Fully Declining Refund |
| <input type="checkbox"/> Fee for Service | <input checked="" type="checkbox"/> 50% Refund |
| <input type="checkbox"/> Equity | <input type="checkbox"/> 80% Refund |
| <input type="checkbox"/> Rental (No Entrance Fee) | <input type="checkbox"/> 90% Refund |
| <input type="checkbox"/> Assignment of Assets | <input type="checkbox"/> Full Refund |

OCCUPANCY:

	Total Units	Occupied Units	Residents	Percent Occupied
Independent Living	124	103	126	83.1%
Assisted Living	88	80	80	90.9%
Nursing Beds:	42	27	24	64.3%
Total:	254	210	230	82.7%

OTHER:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Dementia Units Available | <input type="checkbox"/> Medicaid Certified |
| <input checked="" type="checkbox"/> Direct Admission to Assisted Living | <input checked="" type="checkbox"/> Medicare Certified |
| <input type="checkbox"/> Direct Admission to Nursing | <input checked="" type="checkbox"/> Pets (some) Allowed |
| <input checked="" type="checkbox"/> Utilities (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Emergency Call System |
| <input checked="" type="checkbox"/> Waiting List on (some or all) Units | <input checked="" type="checkbox"/> Swimming Pool/Spa/Sauna |
| <input type="checkbox"/> Residents on the Board of Directors | <input checked="" type="checkbox"/> Transportation Available |
| <input checked="" type="checkbox"/> Housekeeping (some or all) in Monthly Fees | <input checked="" type="checkbox"/> Exercise Room or Programs |
| <input checked="" type="checkbox"/> Meals (some or all) in Monthly Fees | <input type="checkbox"/> Undergoing Expansion |

Appendix 1 - Summary of Contract and Refund Options

FacilityName	Contract Options					Refund Options					
	Extensive	Modified	Fee For Service	Equity	Rental	No Refund	Declining Refund	50% Refund	80% Refund	90% Refund	Full
Abernethy Laurels			√		√		√	√			
Aldersgate		√			√		√	√		√	
Arbor Acres		√					√				
Ardenwoods			√					√		√	
Belle Meade and Pine Knoll at St. Joseph of the Pines	√		√		√		√	√		√	
Brookdale Carriage Club Providence			√		√						
Brookridge Retirement Community		√					√	√		√	
Brooks-Howell Home			√			√					
Carmel Hills		√	√				√	√		√	
Carol Woods		√					√				
Carolina Bay at Autumn Hall				√	√	√					
Carolina Meadows Retirement Community			√	√							√
Carolina Village	√					√	√				
Covenant Village	√						√				
Croasdaile Village Retirement Community			√				√	√		√	
Cypress Glen Retirement Community			√				√	√	√	√	
Deerfield Episcopal Retirement Community	√						√	√		√	
Friends Homes at Guilford			√			√	√				

Appendix 1 - Summary of Contract and Refund Options

FacilityName	Contract Options					Refund Options					
	Extensive	Modified	Fee For Service	Equity	Rental	No Refund	Declining Refund	50% Refund	80% Refund	90% Refund	Full
Friends Homes West			√				√				
Galloway Ridge at Fearington	√						√			√	
Givens Estates			√			√		√		√	
Givens Highland Farms			√		√		√	√			
Glenaire		√					√	√		√	
Grace Ridge Retirement Community	√	√	√			√				√	
Oak Creek Apartments			√		√		√				
Penick Village		√	√				√	√		√	
Pennybyrn at Maryfield		√					√	√		√	
Piedmont Crossing			√		√		√	√			
Pisgah Valley Retirement Community			√							√	
Pittsboro Christian Village		√	√			√	√				
Plantation Estates	√						√	√			
Plantation Village		√					√	√		√	
Quail Haven Village			√		√						
River Landing at Sandy Ridge		√			√		√	√		√	
Salemtowne		√					√	√		√	
Scotia Village Retirement Community		√			√		√	√		√	

Appendix 1 - Summary of Contract and Refund Options

FacilityName	Contract Options					Refund Options					
	Extensive	Modified	Fee For Service	Equity	Rental	No Refund	Declining Refund	50% Refund	80% Refund	90% Refund	Full
SearStone	√										√
Sharon Towers		√					√	√		√	
Sharon Village Apartments			√		√		√				
Southminster		√					√	√		√	
Springmoor Life Care Retirement Community		√				√	√	√			√
Stanley Total Living Center			√		√						
The Cedars of Chapel Hill Club, Inc.				√							
The Cypress of Charlotte				√							
The Cypress of Raleigh				√							
The Forest at Duke		√					√	√		√	
The Gardens of Taylor Glen		√					√				
The Oaks at Whitaker Glen			√				√	√			
The Pines at Davidson		√					√	√		√	
The Village at Brookwood	√		√				√	√		√	
Trinity Oaks		√				√		√		√	
Tryon Estates	√						√	√			
Twin Lakes Community			√				√	√			
Well-Spring Retirement Community	√	√					√			√	

Appendix 1 - Summary of Contract and Refund Options

FacilityName	Contract Options					Refund Options					
	Extensive	Modified	Fee For Service	Equity	Rental	No Refund	Declining Refund	50% Refund	80% Refund	90% Refund	Full
Wesley Pines Retirement Community		√				√	√	√		√	
White Oak Village Apartments			√		√		√				
Whitestone: A Masonic and Eastern Star Community	√	√	√			√	√	√		√	
Windsor Point		√					√	√			

Appendix 2 - Other Services/Features

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|--|--|
| <p>A Dementia Units Available</p> <p>B Direct Admission to Assisted Living</p> <p>C Direct Admission to Nursing</p> <p>D Emergency Call System</p> <p>E Exercise Room or Programs</p> <p>F Undergoing Expansion</p> <p>G Housekeeping (some or all) in Monthly Fees</p> <p>H Meals (some or all) in Monthly Fees</p> | <p>I Medicaid Certified</p> <p>J Medicare Certified</p> <p>K Pets (some) Allowed</p> <p>L Residents on Board of Directors</p> <p>M Swimming Pool/Spa/Sauna</p> <p>N Transportation Available</p> <p>O Utilities (some or all) in Monthly Fees</p> <p>P Waiting List on (some or all) Units</p> |
|--|--|

Facility	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Abernethy Laurels	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Aldersgate	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Arbor Acres	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓
Ardenwoods		✓		✓	✓		✓	✓			✓		✓	✓	✓	✓
Belle Meade and Pine Knoll at St. Joseph of the Pines	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Brookdale Carriage Club Providence	✓	✓		✓	✓		✓	✓		✓	✓		✓	✓	✓	✓
Brookridge Retirement Community	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓
Brooks-Howell Home			✓	✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
Carmel Hills		✓			✓		✓	✓			✓	✓		✓	✓	✓
Carol Woods				✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓
Carolina Bay at Autumn Hall	✓	✓	✓	✓	✓		✓	✓		✓	✓		✓	✓	✓	✓
Carolina Meadows Retirement Community	✓	✓		✓	✓						✓	✓	✓	✓	✓	✓
Carolina Village		✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓
Covenant Village				✓	✓		✓	✓				✓	✓	✓	✓	✓
Croasdaile Village Retirement Community	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cypress Glen Retirement Community	✓	✓		✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓
Deerfield Episcopal Retirement Community	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Friends Homes at Guilford	✓	✓	✓	✓	✓			✓	✓	✓		✓	✓	✓	✓	✓
Friends Homes West		✓		✓	✓			✓		✓		✓	✓	✓	✓	✓
Galloway Ridge at Ferrington				✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓
Givens Estates	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Appendix 2 - Other Services/Features

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|--|--|
| <p>A Dementia Units Available</p> <p>B Direct Admission to Assisted Living</p> <p>C Direct Admission to Nursing</p> <p>D Emergency Call System</p> <p>E Exercise Room or Programs</p> <p>F Undergoing Expansion</p> <p>G Housekeeping (some or all) in Monthly Fees</p> <p>H Meals (some or all) in Monthly Fees</p> | <p>I Medicaid Certified</p> <p>J Medicare Certified</p> <p>K Pets (some) Allowed</p> <p>L Residents on Board of Directors</p> <p>M Swimming Pool/Spa/Sauna</p> <p>N Transportation Available</p> <p>O Utilities (some or all) in Monthly Fees</p> <p>P Waiting List on (some or all) Units</p> |
|--|--|

Facility	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Givens Highland Farms		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓
Glenaire	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Grace Ridge Retirement Community	✓	✓		✓	✓		✓	✓			✓		✓	✓	✓	✓
Oak Creek Apartments	✓		✓	✓	✓		✓	✓	✓	✓	✓			✓	✓	✓
Penick Village		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓
Pennybyrn at Maryfield	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Piedmont Crossing	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓
Pisgah Valley Retirement Community		✓	✓	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓	✓
Pittsboro Christian Village		✓		✓	✓		✓	✓			✓		✓	✓	✓	✓
Plantation Estates	✓	✓		✓	✓	✓		✓		✓	✓	✓	✓	✓	✓	✓
Plantation Village				✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
Quail Haven Village			✓	✓	✓		✓	✓	✓	✓	✓			✓	✓	✓
River Landing at Sandy Ridge	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Salemtowne	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Scotia Village Retirement Community	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
SearStone	✓			✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
Sharon Towers		✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
Sharon Village Apartments			✓	✓	✓		✓	✓			✓			✓	✓	✓
Southminster	✓	✓	✓	✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
Springmoor Life Care Retirement Community	✓	✓		✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
Stanley Total Living Center	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓

Appendix 2 - Other Services/Features

- | | |
|--|--|
| <p>A Dementia Units Available</p> <p>B Direct Admission to Assisted Living</p> <p>C Direct Admission to Nursing</p> <p>D Emergency Call System</p> <p>E Exercise Room or Programs</p> <p>F Undergoing Expansion</p> <p>G Housekeeping (some or all) in Monthly Fees</p> <p>H Meals (some or all) in Monthly Fees</p> | <p>I Medicaid Certified</p> <p>J Medicare Certified</p> <p>K Pets (some) Allowed</p> <p>L Residents on Board of Directors</p> <p>M Swimming Pool/Spa/Sauna</p> <p>N Transportation Available</p> <p>O Utilities (some or all) in Monthly Fees</p> <p>P Waiting List on (some or all) Units</p> |
|--|--|

Facility	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
The Cedars of Chapel Hill Club, Inc.	✓			✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓
The Cypress of Charlotte	✓			✓	✓		✓	✓		✓	✓		✓	✓	✓	✓
The Cypress of Raleigh	✓			✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓
The Forest at Duke	✓	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓
The Gardens of Taylor Glen	✓	✓		✓	✓		✓	✓		✓	✓		✓	✓	✓	✓
The Oaks at Whitaker Glen			✓	✓	✓			✓	✓	✓	✓			✓	✓	✓
The Pines at Davidson	✓	✓	✓	✓	✓		✓	✓			✓	✓	✓	✓	✓	✓
The Village at Brookwood	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Trinity Oaks	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Tryon Estates	✓	✓		✓	✓			✓		✓	✓	✓	✓	✓	✓	✓
Twin Lakes Community	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓
Well-Spring Retirement Community	✓	✓		✓	✓	✓		✓			✓	✓	✓	✓	✓	✓
Wesley Pines Retirement Community		✓	✓	✓	✓		✓	✓	✓	✓	✓	✓		✓	✓	✓
White Oak Village Apartments		✓	✓	✓	✓		✓	✓	✓	✓				✓	✓	✓
Whitestone: A Masonic and Eastern Star Community	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Windsor Point	✓	✓		✓	✓		✓	✓		✓	✓		✓	✓	✓	✓

Appendix 3 - Occupancy Report

FacilityName	Available			Occupied			Residents			Occupancy %		
	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing
Abernethy Laurels	184	18	174	153	17	146	198	17	146	83.2%	94.4%	83.9%
Aldersgate	249	92	100	225	91	93	283	92	93	90.4%	98.9%	93.0%
Arbor Acres	265	96	65	249	91	61	311	91	56	94.0%	94.8%	93.8%
Ardenwoods	91	48	0	88	44	0	93	50	0	96.7%	91.7%	N/A
Belle Meade and Pine Knoll at St. Joseph of the Pines	295	78	167	235	53	158	310	56	158	79.7%	67.9%	94.6%
Brookdale Carriage Club Providence	276	88	42	255	88	31	289	88	31	92.4%	100.0%	73.8%
Brookridge Retirement Community	138	36	77	87	31	59	113	31	59	63.0%	86.1%	76.6%
Brooks-Howell Home	52	0	49	45	0	44	47	0	44	86.5%	N/A	89.8%
Carmel Hills	42	38	0	39	28	0	44	28	0	92.9%	73.7%	N/A
Carol Woods	312	89	30	297	72	27	486	72	27	95.2%	80.9%	90.0%
Carolina Bay at Autumn Hall	130	70	30	56	0	0	80	0	0	43.1%	0.0%	0.0%
Carolina Meadows Retirement Community	440	79	90	413	65	67	602	69	67	93.9%	82.3%	74.4%
Carolina Village	344	60	58	330	57	55	461	57	55	95.9%	95.0%	94.8%
Covenant Village	182	33	38	172	31	37	220	31	37	94.5%	93.9%	97.4%
Croasdaile Village Retirement Community	402	30	110	375	29	105	491	29	105	93.3%	96.7%	95.5%

Appendix 3 - Occupancy Report

FacilityName	Available			Occupied			Residents			Occupancy %		
	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing
Cypress Glen Retirement Community	198	42	30	182	41	27	218	41	27	91.9%	97.6%	90.0%
Deerfield Episcopal Retirement Community	351	60	62	338	60	59	495	60	59	96.3%	100.0%	95.2%
Friends Homes at Guilford	197	52	69	193	47	66	225	47	66	98.0%	90.4%	95.7%
Friends Homes West	171	40	40	156	36	36	190	36	36	91.2%	90.0%	90.0%
Galloway Ridge at Fearington	300	51	40	287	36	33	392	36	33	95.7%	70.6%	82.5%
Givens Estates	373	61	70	354	61	64	481	62	64	94.9%	100.0%	91.4%
Givens Highland Farms	212	30	60	206	22	39	260	21	39	97.2%	73.3%	65.0%
Glenaire	212	49	71	207	48	64	272	48	64	97.6%	98.0%	90.1%
Grace Ridge Retirement Community	149	47	25	117	39	23	144	39	23	78.5%	83.0%	92.0%
Oak Creek Apartments	52	0	160	45	0	137	53	0	137	86.5%	N/A	85.6%
Penick Village	152	42	50	140	38	44	197	38	44	92.1%	90.5%	88.0%
Pennybyrn at Maryfield	180	48	125	179	45	113	225	45	113	99.4%	93.8%	90.4%
Piedmont Crossing	164	20	114	152	20	105	195	20	105	92.7%	100.0%	92.1%
Pisgah Valley Retirement Community	34	24	118	34	23	116	44	24	116	100.0%	95.8%	98.3%
Pittsboro Christian Village	64	27	0	63	23	0	87	23	0	98.4%	85.2%	N/A

Appendix 3 - Occupancy Report

FacilityName	Available			Occupied			Residents			Occupancy %		
	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing
Plantation Estates	357	60	80	342	57	72	432	57	72	95.8%	95.0%	90.0%
Plantation Village	248	0	0	231	0	0	297	0	0	93.1%	N/A	N/A
Quail Haven Village	73	0	0	66	0	0	78	0	0	90.4%	N/A	N/A
River Landing at Sandy Ridge	298	56	60	289	53	57	419	54	57	97.0%	94.6%	95.0%
Salemtowne	170	46	84	160	34	80	183	28	80	94.1%	73.9%	95.2%
Scotia Village Retirement Community	126	28	58	121	25	52	161	23	52	96.0%	89.3%	89.7%
SearStone	169	8	16	154	8	16	229	8	16	91.1%	100.0%	100.0%
Sharon Towers	193	40	96	183	38	59	225	38	59	94.8%	95.0%	61.5%
Sharon Village Apartments	33	0	180	33	0	155	35	0	155	100.0%	N/A	86.1%
Southminster	257	25	60	253	24	41	320	24	41	98.4%	96.0%	68.3%
Springmoor Life Care Retirement Community	391	18	173	369	17	118	427	17	118	94.4%	94.4%	68.2%
Stanley Total Living Center	29	24	106	25	24	104	31	24	104	86.2%	100.0%	98.1%
The Cedars of Chapel Hill Club, Inc.	306	4	44	305	4	42	402	4	42	99.7%	100.0%	95.5%
The Cypress of Charlotte	310	4	56	310	4	51	412	4	51	100.0%	100.0%	91.1%
The Cypress of Raleigh	205	4	36	205	3	31	283	3	31	100.0%	75.0%	86.1%

Appendix 3 - Occupancy Report

FacilityName	Available			Occupied			Residents			Occupancy %		
	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing	ILU	ALU	Nursing
The Forest at Duke	255	34	58	239	28	53	310	28	53	93.7%	82.4%	91.4%
The Gardens of Taylor Glen	125	24	24	87	17	15	105	17	15	69.6%	70.8%	62.5%
The Oaks at Whitaker Glen	96	0	135	81	0	111	91	0	111	84.4%	N/A	82.2%
The Pines at Davidson	225	30	51	219	29	51	281	29	51	97.3%	96.7%	100.0%
The Village at Brookwood	151	24	85	139	22	75	181	22	75	92.1%	91.7%	88.2%
Trinity Oaks	177	45	115	130	42	111	161	42	111	73.4%	93.3%	96.5%
Tryon Estates	270	44	52	215	40	39	307	40	39	79.6%	90.9%	75.0%
Twin Lakes Community	393	56	116	358	47	107	508	47	107	91.1%	83.9%	92.2%
Well-Spring Retirement Community	238	71	60	234	61	60	285	61	60	98.3%	85.9%	100.0%
Wesley Pines Retirement Community	22	36	62	17	34	56	23	36	56	77.3%	94.4%	90.3%
White Oak Village Apartments	100	23	70	97	20	64	112	20	64	97.0%	87.0%	91.4%
Whitestone: A Masonic and Eastern Star Community	162	12	88	152	12	80	202	12	80	93.8%	100.0%	90.9%
Windsor Point	124	88	42	103	80	27	126	80	24	83.1%	90.9%	64.3%
Totals	11,714	2,252	4,071	10,789	1,959	3,536	14,132	1,969	3,528	90.8%	90.3%	87.6%

Total Facilities: 58

Appendix 4 - CCRCs by County

County	City	Facility Name	Address	Zip
<i>Alamance</i>				
	Burlington	Oak Creek Apartments	343 Baldwin Road	27217
		The Village at Brookwood	1860 Brookwood Avenue	27215
		Twin Lakes Community	3701 Wade Coble Drive	27215
<i>Buncombe</i>				
	Arden	Ardenwoods	2400 Appalachian Boulevard	28704
	Asheville	Brooks-Howell Home	266 Merrimon Avenue	28801
	Asheville	Deerfield Episcopal Retirement Community	1617 Hendersonville Road	28803
	Asheville	Givens Estates	2360 Sweeten Creek Road	28803
	Black Mountain	Givens Highland Farms	200 Tabernacle Road	28711
	Candler	Pisgah Valley Retirement Community	95 Holcombe Cove Road	28715
<i>Burke</i>				
	Morganton	Grace Ridge Retirement Community	500 Lenoir Road	28655
<i>Cabarrus</i>				
	Concord	The Gardens of Taylor Glen	3700 Taylor Glen Lane	28027

Appendix 4 - CCRCs by County

County	City	Facility Name	Address	Zip
<i>Catawba</i>				
	Newton	Abernethy Laurels	102 Leonard Avenue	28658
<i>Chatham</i>				
	Chapel Hill	Carolina Meadows Retirement Community	100 Carolina Meadows	27517
	Pittsboro	Galloway Ridge at Fearington	3000 Galloway Ridge	27312
	Pittsboro	Pittsboro Christian Village	1825 East Street	27312
<i>Davidson</i>				
	Thomasville	Piedmont Crossing	100 Hedrick Drive	27360
<i>Durham</i>				
	Chapel Hill	The Cedars of Chapel Hill Club, Inc.	100 Cedar Club Circle	27517
	Durham	Croasdaile Village Retirement Community	2600 Croasdaile Farm Parkway	27705
	Durham	The Forest at Duke	2701 Pickett Road	27705
<i>Forsyth</i>				
	Winston-Salem	Arbor Acres	1240 Arbor Road	27104
	Winston-Salem	Brookridge Retirement Community	1199 Hayes Forest Drive	27106
	Winston-Salem	Salemtowne	1000 Salemtowne Drive	27106

Appendix 4 - CCRCs by County

County	City	Facility Name	Address	Zip
<i>Gaston</i>				
	Gastonia	Covenant Village	1351 Robinwood Road	28054
	Stanley	Stanley Total Living Center	514 Old Mt. Holly Road	28164
<i>Guilford</i>				
	Greensboro	Friends Homes at Guilford	925 New Garden Road	27410
	Greensboro	Friends Homes West	6100 W. Friendly Avenue	27410
	High Point	Pennybyrn at Maryfield	109 Penny Road	27260
	Colfax	River Landing at Sandy Ridge	1575 John Knox Drive	27235
	Greensboro	Well-Spring Retirement Community	4100 Well Spring Drive	27410
	Greensboro	Whitestone: A Masonic and Eastern Star Community	700 South Holden Road	27407
<i>Henderson</i>				
	Hendersonville	Carolina Village	600 Carolina Village Road	28792

Appendix 4 - CCRCs by County

County	City	Facility Name	Address	Zip
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Mecklenburg

	Charlotte	Aldersgate	3800 Shamrock Drive	28215
	Charlotte	Brookdale Carriage Club Providence	5800 Old Providence Road	28226
	Charlotte	Carmel Hills	2801 Carmel Road	28226
	Charlotte	Sharon Towers	5100 Sharon Road	28210
	Charlotte	Sharon Village Apartments	4009 Craig Avenue	28211
	Charlotte	Southminster	8919 Park Road	28210
	Charlotte	The Cypress of Charlotte	3442 Cypress Club Drive	28210
	Davidson	The Pines at Davidson	400 Avinger Lane	28036
	Matthews	Plantation Estates	733 Plantation Estates Drive	28105

Moore

	Pinehurst	Quail Haven Village	155 Blake Boulevard	28374
	Southern Pines	Belle Meade and Pine Knoll at St. Joseph of the Pines	100 Gossman Drive	28387
	Southern Pines	Penick Village	500 East Rhode Island Ave	28387

New Hanover

	Wilmington	Carolina Bay at Autumn Hall	630 Carolina Bay Dr.	28403
	Wilmington	Plantation Village	1200 Porters Neck Road	28411

Appendix 4 - CCRCs by County

County	City	Facility Name	Address	Zip
<i>Orange</i>				
	Chapel Hill	Carol Woods	750 Weaver Dairy Road	27514
<i>Pitt</i>				
	Greenville	Cypress Glen Retirement Community	100 Hickory Street	27858
<i>Polk</i>				
	Columbus	Tryon Estates	617 Laurel Lake Drive	28722
	Tryon	White Oak Village Apartments	70 Oak Street	28782
<i>Robeson</i>				
	Lumberton	Wesley Pines Retirement Community	1000 Wesley Pines Road	28358
<i>Rowan</i>				
	Salisbury	Trinity Oaks	728 Klumac Road	28144
<i>Scotland</i>				
	Laurinburg	Scotia Village Retirement Community	2200 Elm Avenue	28352

Appendix 4 - CCRCs by County

County	City	Facility Name	Address	Zip
<i>Wake</i>				
	Cary	Glenaire	4000 Glenaire Circle	27511
	Cary	SearStone	17001 SearStone Drive	27513
	Fuquay-Varina	Windsor Point	1221 Broad Street	27526
	Raleigh	Springmoor Life Care Retirement Community	1500 Sawmill Road	27615
	Raleigh	The Cypress of Raleigh	8801 Cypress Lakes Drive	27615
	Raleigh	The Oaks at Whitaker Glen	501 East Whitaker Mill Road	27608



SHIIP

Seniors' Health Insurance Information Program
North Carolina Department of Insurance
1-855-408-1212 • www.ncshiip.com

What is SHIIP?

Seniors' Health Insurance Information Program (SHIIP) is a consumer information division of the North Carolina Department of Insurance that assists people with Medicare, Medicare Part D, Medicare supplements, Medicare Advantage, and long-term care insurance questions. SHIIP also helps citizens recognize and prevent Medicare billing errors and possible fraud and abuse through the NCSMP Program at 1-855-408-1212.

How does SHIIP work?

SHIIP provides education and assistance to North Carolinians in three ways:

- by operating a toll-free consumer information phone line Monday through Friday from 8 a.m. until 5 p.m.
- by training volunteers, including senior citizens, to counsel Medicare beneficiaries within their community about Medicare, Medicare Part D, Medicare supplements, Medicare Advantage and long-term care insurance, and
- by creating educational materials for consumer's use including the *Medicare Supplement Comparison Guide* and featuring a Medicare Supplement Comparison Database on their Web site.

When was SHIIP started?

The program was founded in 1986 by the Department of Insurance in direct response to the growing concerns about health insurance for the more than one million Medicare beneficiaries in North Carolina. More than 100 different insurance companies sell Medicare supplements, Medicare Part D, Medicare Advantage, long-term care insurance and other medical insurance products to people in North Carolina. Because there are so many companies and because the Medicare system is so complex, SHIIP was founded to provide people with Medicare an objective information service.

How do North Carolinians contact SHIIP?

You can contact SHIIP by dialing the nationwide toll-free consumer line, 1-855-408-1212, visiting the SHIIP Web site at www.ncshiip.com, or e-mailing ncshiip@ncdoi.gov. Trained SHIIP Volunteer Counselors are available in all 100 counties of North Carolina who are coordinated through an existing human service agency such as the Council on Aging or the Cooperative Extension offices. If your problem is too complex to handle over the phone, you will need to contact your local SHIIP Coordinator for a one-on-one appointment with a SHIIP Volunteer Counselor.

Can I get more information on SHIIP?

Yes! Contact SHIIP nationwide at 1-855-408-1212, visit www.ncshiip.com or e-mail ncshiip@ncdoi.gov for further information and ask for more details on the Seniors' Health Insurance Information Program and how it can help you.

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Article 64.

Continuing Care Retirement Communities.

§ 58-64-1. Definitions.

As used in this Article, unless otherwise specified:

- (1) Continuing care. - The furnishing to an individual other than an individual related by blood, marriage, or adoption to the person furnishing the care, of lodging together with nursing services, medical services, or other health related services, under a contract approved by the Department in accordance with this Article effective for the life of the individual or for a period longer than one year. "Continuing care" may also include home care services provided or arranged by a provider of lodging at a facility to an individual who has entered into a continuing care contract with the provider but is not yet receiving lodging.
- (2) Entrance fee. - A payment that assures a resident a place in a facility for a term of years or for life.
- (3) Facility. - The retirement community or communities in which a provider undertakes to provide continuing care to an individual.
- (4) Health-related services. - At a minimum, nursing home admission or assistance in the activities of daily living, exclusive of the provision of meals or cleaning services.
- (4a) Home care services. - Defined in G.S. 131E-136.
- (5) Living unit. - A room, apartment, cottage, or other area within a facility set aside for the exclusive use or control of one or more identified residents.
- (5a) Lodging. - A living unit as set forth in a contract approved by the Department in accordance with this Article.
- (6) Provider. - The promoter, developer, or owner of a facility, whether a natural person, partnership, or other unincorporated association, however organized, trust, or corporation, of an institution, building, residence, or other place, whether operated for profit or not, or any other person, that solicits or undertakes to provide continuing care under a continuing care facility contract, or that represents himself, herself, or itself as providing continuing care or "life care."
- (7) Resident. - A purchaser of, a nominee of, or a subscriber to, a continuing care contract.
- (8) Hazardous financial condition. - A provider is insolvent or in eminent danger of becoming insolvent. (1989, c. 758, s. 1; 1989 (Reg. Sess., 1990), c. 1024, s. 45; 1991, c. 720, ss. 2, 39; 1999-132, ss. 2.2, 2.3; 2010-128, s. 2.)

§ 58-64-5. License.

(a) No provider shall engage in the business of offering or providing continuing care in this State without a license to do so obtained from the Commissioner as provided in this Article. It is a Class 1 misdemeanor for any person, other than a provider licensed under this Article, to advertise or market to the general public any product similar to continuing care through the use of such terms as "life care", "continuing care", or "guaranteed care for life", or similar terms, words, or phrases. The licensing process may involve a series of steps pursuant to rules adopted by the Commissioner under this Article.

(b) The application for a license shall be filed with the Department by the provider on forms prescribed by the Department and within a period of time prescribed by the Department; and shall include all information required by the Department pursuant to rules adopted by it under this Article including, but not limited to, the disclosure statement meeting the requirements of this Article and other financial and facility development information required by the Department. The application for a license must be accompanied by an application fee of one thousand dollars (\$1,000).

(c) Upon receipt of the complete application for a license in proper form, the Department shall, within 10 business days, issue a notice of filing to the applicant. Within 90 days of the notice of filing, the Department shall enter an order issuing the license or rejecting the application.

(d) If the Commissioner determines that any of the requirements of this Article have not been met, the Commissioner shall notify the applicant that the application must be corrected within 30 days in such particulars as designated by the Commissioner. If the requirements are not met within the time allowed, the Commissioner may enter an order rejecting the application, which order shall include the findings of fact upon which the order is based and which shall not become effective until 20 days after the end of the 30-day period. During the 20-day period, the applicant may petition for reconsideration and is entitled to a hearing.

(e) Repealed by Session Laws 2003-193, s. 1, effective June 12, 2003.

(f) The Commissioner may, on an annual basis or on a more frequent basis if he deems it to be necessary, in addition to the annual disclosure statement revision required by G.S. 58-64-30, require every licensed provider to file with the Department any of the information provided by G.S. 58-64-5(b) for new licensure that the Commissioner, pursuant to rules adopted by him under this Article, determines is needed for review of licensed providers.

(g) The Commissioner may require a provider to: (i) provide the report of an actuary that estimates the capacity of the provider to meet its contractual obligation to the resident, or (ii) give consideration to expected rates of mortality and morbidity, expected refunds, and expected capital expenditures in accordance with standards promulgated by the American Academy of Actuaries, within the five-year forecast statements, as required by G.S. 58-64-20(a)(12). (1989, c. 758, s. 1; 1991, c. 196, ss. 1, 2; 2001-223, s. 22.1; 2003-193, ss. 1, 2; 2009-451, s. 21.9(a); 2010-128, s. 1.)

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§ 58-64-7. Continuing care services without lodging.

(a) A provider of continuing care who has obtained a license pursuant to this Article and desires to provide or arrange for continuing care services, including home care services, to an individual who has entered into a continuing care contract with the provider but is not yet receiving lodging must submit the following to the Commissioner:

- (1) An application to offer continuing care services without providing lodging.
- (2) An amended disclosure statement containing a description of the proposed continuing care services that will be provided without lodging, including the target market, the types of services to be provided, and the fees to be charged.
- (3) A copy of the written service agreement, which must contain those provisions as prescribed in G.S. 58-64-25(b).
- (4) A summary of an actuarial report that presents the impact of providing continuing care services without lodging on the overall operation of the continuing care retirement community.
- (5) A financial feasibility study prepared by a certified public accountant that shows the financial impact of providing continuing care services without lodging on the applicant and the continuing care retirement facility or facilities. The financial feasibility study shall include a statement of activities reporting the revenue and expense details for providing continuing care services without lodging, as well as any impact the provision of these services will have on operating reserves.
- (6) Evidence of the license required under Part 3 of Article 6 of Chapter 131E of the General Statutes to provide home care services, or a contract with a licensed home care agency for the provision of home care services to the individuals under the continuing care services without lodging program.

(b) A provider issued a start-up certificate for the provision of continuing care services without lodging must enter into binding written service agreements with subscribers to provide continuing care services without lodging.

(c) When providing the financial statements and five-year forecasts required by G.S. 58-64-20, a provider offering continuing care services without lodging must account for the related revenue and expenses generated from the provision of these services separate from the facility's on-site operation. (2010-128, s. 4.)

§ 58-64-10. Revocation of license.

(a) The license of a provider shall remain in effect until revoked after notice and hearing, upon written findings of fact by the Commissioner, that the provider has:

- (1) Willfully violated any provision of this Article or of any rule or order of the Commissioner;
- (2) Failed to file an annual disclosure statement or standard form of contract as required by this Article;
- (3) Failed to deliver to prospective residents the disclosure statements required by this Article;
- (4) Delivered to prospective residents a disclosure statement that makes an untrue statement or omits a material fact and the provider, at the time of the delivery of the disclosure statement, had actual knowledge of the misstatement or omission;
- (5) Failed to comply with the terms of a cease and desist order; or
- (6) Has been determined by the Commissioner to be in a hazardous financial condition.

(b) Findings of fact in support of revocation shall be accompanied by an explicit statement of the underlying facts supporting the findings.

(c) If the Commissioner has good cause to believe that the provider is guilty of a violation for which revocation could be ordered, the Commissioner may first issue a cease and desist order. If the cease and desist order is not or cannot be effective in remedying the violation, the Commissioner may, after notice and hearing, order that the license be revoked and surrendered. Such a cease and desist order may be appealed to the Superior Court of Wake County in the manner provided by G.S. 58-63-35. The provider shall accept no new applicant funds while the revocation order is under appeal. (1989, c. 758, s. 1.)

§ 58-64-15. Sale or transfer of ownership.

No license is transferable, and no license issued pursuant to this Article has value for sale or exchange as property. No provider or other owning entity shall sell or transfer ownership of the facility, or enter into a contract with a third-party provider for management of the facility, unless the Commissioner approves such transfer or contract. (1989, c. 758, s. 1.)

§ 58-64-20. Disclosure statement.

(a) At the time of, or prior to, the execution of a contract to provide continuing care, or at the time of, or prior to, the transfer of any money or other property to a provider by or on behalf of a prospective resident, whichever occurs first, the provider shall deliver a current disclosure statement to the person with whom the contract is to be entered into, the text of which shall contain at least:

- (1) The name and business address of the provider and a statement of whether the provider is a partnership, corporation, or other type of legal entity.

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- (2) The names and business addresses of the officers, directors, trustees, managing or general partners, any person having a ten percent (10%) or greater equity or beneficial interest in the provider, and any person who will be managing the facility on a day-to-day basis, and a description of these persons' interests in or occupations with the provider.
- (3) The following information on all persons named in response to subdivision (2) of this section:
 - a. A description of the business experience of this person, if any, in the operation or management of similar facilities;
 - b. The name and address of any professional service firm, association, trust, partnership, or corporation in which this person has, or which has in this person, a ten percent (10%) or greater interest and which it is presently intended shall currently or in the future provide goods, leases, or services to the facility, or to residents of the facility, of an aggregate value of five hundred dollars (\$500.00) or more within any year, including a description of the goods, leases, or services and the probable or anticipated cost thereof to the facility, provider, or residents or a statement that this cost cannot presently be estimated; and
 - c. A description of any matter in which the person (i) has been convicted of a felony or pleaded nolo contendere to a felony charge, or been held liable or enjoined in a civil action by final judgment, if the felony or civil action involved fraud, embezzlement, fraudulent conversion, or misappropriation of property; or (ii) is subject to a currently effective injunctive or restrictive court order, or within the past five years, had any State or federal license or permit suspended or revoked as a result of an action brought by a governmental agency or department, if the order or action arose out of or related to business activity of health care, including actions affecting a license to operate a foster care facility, nursing home, retirement home, home for aged, or facility subject to this Article or a similar law in another state.
- (4) A statement as to whether the provider is, or is not affiliated with, a religious, charitable, or other nonprofit organization, the extent of the affiliation, if any, the extent to which the affiliate organization will be responsible for the financial and contract obligations of the provider, and the provision of the Federal Internal Revenue Code, if any, under which the provider or affiliate is exempt from the payment of income tax.
- (5) The location and description of the physical property or properties of the facility, existing or proposed, and to the extent proposed, the estimated completion date or dates, whether construction has begun, and the contingencies subject to which construction may be deferred.
- (6) The services provided or proposed to be provided pursuant to contracts for continuing care at the facility, including the extent to which medical care is furnished, and a clear statement of which services are included for specified basic fees for continuing care and which services are made available at or by the facility at extra charge.
- (7) A description of all fees required of residents, including the entrance fee and periodic charges, if any. The description shall include:
 - a. A statement of the fees that will be charged if the resident marries while at the facility, and a statement of the terms concerning the entry of a spouse to the facility and the consequences if the spouse does not meet the requirements for entry;
 - b. The circumstances under which the resident will be permitted to remain in the facility in the event of possible financial difficulties of the resident;
 - c. The terms and conditions under which a contract for continuing care at the facility may be canceled by the provider or by the resident, and the conditions, if any, under which all or any portion of the entrance fee or any other fee will be refunded in the event of cancellation of the contract by the provider or by the resident or in the event of the death of the resident prior to or following occupancy of a living unit;
 - d. The conditions under which a living unit occupied by a resident may be made available by the provider to a different or new resident other than on the death of the prior resident; and
 - e. The manner by which the provider may adjust periodic charges or other recurring fees and the limitations on these adjustments, if any; and, if the facility is already in operation, or if the provider or manager operates one or more similar continuing care locations within this State, tables shall be included showing the frequency and average dollar amount of each increase in periodic charges, or other recurring fees at each facility or location for the previous five years, or such shorter period as the facility or location may have been operated by the provider or manager.
- (8) The health and financial condition required for an individual to be accepted as a resident and to continue as a resident once accepted, including the effect of any change in the health or financial condition of a person between the date of entering into a contract for continuing care and the date of initial occupancy of a living unit by that person.
- (9) The provisions that have been made or will be made, including, but not limited to, the requirements of G.S. 58-64-33 and G.S. 58-64-35, to provide reserve funding or security to enable the provider to perform its obligations fully under contracts to provide continuing care at the facility, including the establishment of escrow accounts, trusts, or reserve funds, together with the manner in which these funds will be invested, and the names and experience of any individuals in the direct employment of the provider who will make the investment decisions.
- (10) Financial statements of the provider certified to by an independent public accountant as of the end of the most recent fiscal year or such shorter period of time as the provider shall have been in existence. If the provider's fiscal year ended more than

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120 days prior to the date the disclosure statement is recorded, interim financial statements as of a date not more than 90 days prior to the date of recording the statement shall also be included, but need not be certified to by an independent certified public accountant.

- (11) In the event the provider has had an actuarial report prepared within the prior two years, the summary of a report of an actuary that estimates the capacity of the provider to meet its contractual obligations to the residents.
- (12) Forecasted financial statements for the provider of the next five years, including a balance sheet, a statement of operations, a statement of cash flows, and a statement detailing all significant assumptions, compiled by an independent certified public accountant. Reporting routine, categories, and structure may be further defined by regulations or forms adopted by the Commissioner.
- (13) The estimated number of residents of the facility to be provided services by the provider pursuant to the contract for continuing care.
- (14) Proposed or development stage facilities shall additionally provide:
 - a. The summary of the report of an actuary estimating the capacity of the provider to meet its contractual obligation to the residents;
 - b. Narrative disclosure detailing all significant assumptions used in the preparation of the forecasted financial statements, including:
 1. Details of any long-term financing for the purchase or construction of the facility including interest rate, repayment terms, loan covenants, and assets pledged;
 2. Details of any other funding sources that the provider anticipates using to fund any start-up losses or to provide reserve funds to assure full performance of the obligations of the provider under contracts for the provision of continuing care;
 3. The total life occupancy fees to be received from or on behalf of, residents at, or prior to, commencement of operations along with anticipated accounting methods used in the recognition of revenues from and expected refunds of life occupancy fees;
 4. A description of any equity capital to be received by the facility;
 5. The cost of the acquisition of the facility or, if the facility is to be constructed, the estimated cost of the acquisition of the land and construction cost of the facility;
 6. Related costs, such as financing any development costs that the provider expects to incur or become obligated for prior to the commencement of operations;
 7. The marketing and resident acquisition costs to be incurred prior to commencement of operations; and
 8. A description of the assumptions used for calculating the estimated occupancy rate of the facility and the effect on the income of the facility of government subsidies for health care services.
- (15) Any other material information concerning the facility or the provider which, if omitted, would lead a reasonable person not to enter into this contract.
 - (b) The cover page of the disclosure statement shall state, in a prominent location and in boldface type, the date of the disclosure statement, the last date through which that disclosure statement may be delivered if not earlier revised, and that the delivery of the disclosure statement to a contracting party before the execution of a contract for the provision of continuing care is required by this Article but that the disclosure statement has not been reviewed or approved by any government agency or representative to ensure accuracy or completeness of the information set out.
 - (c) A copy of the standard form of contract for continuing care used by the provider shall be attached to each disclosure statement.
 - (d) The Commissioner, by rules adopted by him under this Article, may prescribe a standardized format for the disclosure statement required by this section.
 - (e) The disclosure statement shall be in plain English and in language understandable by a layperson and combine simplicity and accuracy to fully advise residents of the items required by this section.
 - (f) The Department may require a provider to alter or amend its disclosure statement in order to provide full and fair disclosure to prospective residents. The Department may also require the revision of a disclosure statement which it finds to be unnecessarily complex, confusing or illegible. (1989, c. 758, s. 1; 1991, c. 196, s. 3; c. 720, s. 89; 1993, c. 452, s. 63; 2001-223, s. 22.2; 2003-193, ss. 3, 4, 5, 6.)

§ 58-64-25. Contract for continuing care; specifications.

- (a) Each contract for continuing care shall provide that:
 - (1) The party contracting with the provider may rescind the contract within 30 days following the later of the execution of the contract or the receipt of a disclosure statement that meets the requirements of this section, and the resident to whom the contract pertains is not required to move into the facility before the expiration of the 30-day period; and
 - (2) If a resident dies before occupying a living unit in the facility, or if, on account of illness, injury, or incapacity, a resident would be precluded from occupying a living unit in the facility under the terms of the contract for continuing care, the contract is automatically canceled; and
 - (3) For rescinded or canceled contracts under this section, the resident or the resident's legal representative shall receive a refund of all money or property transferred to the provider, less (i) periodic charges specified in the contract and applicable only to

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the period a living unit was actually occupied by the resident; (ii) those nonstandard costs specifically incurred by the provider or facility at the request of the resident and described in the contract or any contract amendment signed by the resident; (iii) nonrefundable fees, if set out in the contract; and (iv) a reasonable service charge, if set out in the contract, not to exceed the greater of one thousand dollars (\$1,000) or two percent (2%) of the entrance fee.

- (b) Each contract shall include provisions that specify the following:
- (1) The total consideration to be paid.
 - (2) Services to be provided.
 - (3) The procedures the provider shall follow to change the resident's accommodation if necessary for the protection of the health or safety of the resident or the general and economic welfare of the residents.
 - (4) The policies to be implemented if the resident cannot pay the periodic fees.
 - (5) The terms governing the refund of any portion of the entrance fee in the event of discharge by the provider or cancellation by the resident.
 - (6) The policy regarding increasing the periodic fees.
 - (7) The description of the living quarters.
 - (8) Any religious or charitable affiliations of the provider and the extent, if any, to which the affiliate organization will be responsible for the financial and contractual obligations of the provider.
 - (9) Any property rights of the resident.
 - (10) The policy, if any, regarding fee adjustments if the resident is voluntarily absent from the facility; and
 - (11) Any requirement, if any, that the resident apply for Medicaid, public assistance, or any public benefit program.
 - (12) The procedures for determining when the individual will transition to receiving lodging and health-related services in the event that a contract allows for the provision or arrangement of continuing care without lodging. (1989, c. 758, s. 1; 1991, c. 196, s. 4; 2010-128, s. 3.)

§ 58-64-30. Annual disclosure statement revision.

(a) Within 150 days following the end of each fiscal year, the provider shall file with the Commissioner a revised disclosure statement setting forth current information required pursuant to G.S. 58-64-20. The provider shall also make this revised disclosure statement available to all the residents of the facility. This revised disclosure statement shall include a narrative describing any material differences between (i) the forecasted statements of revenues and expenses and cash flows or other forecasted financial data filed pursuant to G.S. 58-64-20 as a part of the disclosure statement recorded most immediately subsequent to the start of the provider's most recently completed fiscal year and (ii) the actual results of operations during that fiscal year, together with the revised forecasted statements of revenues and expenses and cash flows or other forecasted financial data being filed as a part of the revised disclosure statement. A provider may also revise its disclosure statement and have the revised disclosure statement recorded at any other time if, in the opinion of the provider, revision is necessary to prevent an otherwise current disclosure statement from containing a material misstatement of fact or omitting a material fact required to be stated therein. Only the most recently recorded disclosure statement, with respect to a facility, and in any event, only a disclosure statement dated within one year plus 150 days prior to the date of delivery, shall be considered current for purposes of this Article or delivered pursuant to G.S. 58-64-20.

(b) The annual disclosure statement required to be filed with the Commissioner under this section shall be accompanied by an annual filing fee of one thousand dollars (\$1,000). (1989, c. 758, s. 1; 2003-193, s. 7; 2009-451, s. 21.9(b).)

§ 58-64-33. Operating reserves.

(a) A provider shall maintain after the opening of a facility: an operating reserve equal to fifty percent (50%) of the total operating costs of the facility forecasted for the 12-month period following the period covered by the most recent disclosure statement filed with the Department. The forecast statements as required by G.S. 58-64-20(a)(12) shall serve as the basis for computing the operating reserve. In addition to total operating expenses, total operating costs will include debt service, consisting of principal and interest payments along with taxes and insurance on any mortgage loan or other long-term financing, but will exclude depreciation, amortized expenses, and extraordinary items as approved by the Commissioner. If the debt service portion is accounted for by way of another reserve account, the debt service portion may be excluded. If a facility maintains an occupancy level in excess of ninety percent (90%), a provider shall only be required to maintain a twenty-five percent (25%) operating reserve upon approval of the Commissioner, unless otherwise instructed by the Commissioner. The operating reserve may be funded by cash, by invested cash, or by investment grade securities, including bonds, stocks, U.S. Treasury obligations, or obligations of U.S. government agencies.

(b) A provider that has begun construction or has permanent financing in place or is in operation on the effective date of this section has up to five years to meet the operating reserve requirements.

(c) An operating reserve shall only be released upon the submittal of a detailed request from the provider or facility and must be approved by the Commissioner. Such requests must be submitted in writing for the Commissioner to review at least 10 business days prior to the date of withdrawal. (1991, c. 196, s. 5; c. 720, s. 89; 1993, c. 452, s. 64; 1993 (Reg. Sess., 1994), c. 678, s. 29; 1995, c. 193, s. 52; 2003-193, s. 8; 2004-203, s. 36.)

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§ 58-64-35. Escrow, collection of deposits.

(a) Where escrow accounts are required by this Article, a provider shall establish an escrow account with (i) a bank, (ii) a trust company, or (iii) another independent person or entity agreed upon by the provider and the resident, unless such account arrangement is prohibited by the Commissioner. The terms of this escrow account shall provide that the total amount of any entrance fee, or any other fee or deposit that may be applied toward the entrance fee, received by the provider be placed in this escrow account. These funds may be released only as follows:

- (1) The first twenty-five percent (25%) of escrowed monies can be released when: (i) the provider has presold at least fifty percent (50%) of the independent living units, having received a minimum ten percent (10%) deposit on the presold units; (ii) the provider has received a commitment for any permanent mortgage loan or other long-term financing, and any conditions of the commitment prior to disbursement of funds thereunder have been substantially satisfied; and (iii) aggregate entrance fees received or receivable by the provider pursuant to binding continuing care contracts, plus the anticipated proceeds of any first mortgage loan or other long-term financing commitment are equal to not less than ninety percent (90%) of the aggregate cost of constructing or purchasing, equipping, and furnishing the facility plus not less than ninety percent (90%) of the funds estimated in the statement of cash flows submitted by the provider as that part of the disclosure statement required by G.S. 58-64-20, to be necessary to fund start-up losses and assure full performance of the obligations of the provider pursuant to continuing care contracts.
- (2) The remaining seventy-five percent (75%) of escrowed monies can be released when:
 - a. (i) the provider has presold a minimum of seventy-five percent (75%) of the independent living units, having received a minimum ten percent (10%) deposit on the presold units, or has maintained an independent living unit occupancy minimum of seventy-five percent (75%) for at least 60 days; (ii) construction or purchase of the independent living unit has been completed and an occupancy permit, if applicable, has been issued by the local government having authority to issue such permits; and (iii) the living unit becomes available for occupancy by the new resident; or
 - b. the provider submits a plan of reorganization that is accepted and approved by the Commissioner.

(b) Upon receipt by the escrow agent of a request by the provider for the release of these escrow funds, the escrow agent shall approve release of the funds within five working days unless the escrow agent finds that the requirements of subsection (a) of this section have not been met and notifies the provider of the basis for this finding. The request for release of the escrow funds shall be accompanied by any documentation the fiduciary requires.

(b1) Release of any escrowed funds that may be due to the subscriber or resident shall occur upon: five working days' notice of death, nonacceptance by the facility, or voluntary cancellation. If voluntary cancellation occurs after construction has begun, the refund may be delayed until a new subscriber is obtained for that specific unit, provided it does not exceed a period of two years.

(c) If the provider fails to meet the requirements for release of funds held in this escrow account within a time period the escrow agent considers reasonable, these funds shall be returned by the escrow agent to the persons who have made payment to the provider. The escrow agent shall notify the provider of the length of this time period when the provider requests release of the funds.

(d) Facilities that currently meet the seventy-five percent (75%) presales or the seventy-five percent (75%) occupancy requirements, as outlined in subdivision (a)(2) of this section, are not required to escrow entrance fees, unless otherwise required by the Commissioner. (1989, c. 758, s. 1; 1991, c. 196, s. 6, c. 720, s. 8, c. 761, ss. 11, 12.)

§ 58-64-40. Right to organization.

(a) A resident living in a facility operated by a provider licensed under this Article has the right of self-organization, the right to be represented by an individual of the resident's own choosing, and the right to engage in concerted activities to keep informed on the operation of the facility in which the resident resides or for other mutual aid or protection.

(b) The board of directors or other governing body of a provider or its designated representative shall hold semiannual meetings with the residents of each facility operated by the provider for free discussions of subjects including, but not limited to, income, expenditures, and financial trends and problems as they apply to the facility and discussions of proposed changes in policies, programs, and services. Upon request of the most representative residents' organization, a member of the governing body of the provider, such as a board member, a general partner, or a principal owner shall attend such meetings. Residents shall be entitled to at least seven days advance notice of each meeting. An agenda and any materials that will be distributed by the governing body at the meetings shall remain available upon request to residents. (1989, c. 758, s. 1; 1999-132, s. 2.4; 2001-223, s. 22.3; 2003-193, s. 9.)

§ 58-64-45. Supervision, rehabilitation, and liquidation.

(a) If, at any time, the Commissioner determines, after notice and an opportunity for the provider to be heard, that:

- (1) A portion of an entrance fee escrow account required to be maintained under this Article has been or is proposed to be released in violation of this Article;
- (2) A provider has been or will be unable, in such a manner as may endanger the ability of the provider, to fully perform its obligations pursuant to contracts for continuing care, to meet the forecasted financial data previously filed by the provider;
- (3) A provider has failed to maintain the escrow account required under this Article; or

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(4) A provider is bankrupt or insolvent, or in imminent danger of becoming bankrupt or insolvent; the Commissioner may commence a supervision proceeding pursuant to Article 30 of this Chapter or may apply to the Superior Court of Wake County or to the federal bankruptcy court that may have previously taken jurisdiction over the provider or facility for an order directing the Commissioner or authorizing the Commissioner to rehabilitate or to liquidate a facility in accordance with Article 30 of this Chapter.

(b) The definition of "insolvency" or "insolvent" in G.S. 58-30-10(13) shall not apply to providers under this Article. Rules adopted by the Commissioner shall define and describe "insolvency" or "hazardous financial condition" for providers under this Article. G.S. 58-30-12 shall not apply to facilities under this Article.

(c) If, at any time, the Court finds, upon petition of the Commissioner or provider, or on its own motion, that the objectives of an order to rehabilitate a provider have been accomplished and that the facility or facilities owned by, or operated by, the provider can be returned to the provider's management without further jeopardy to the residents of the facility or facilities, the Court may, upon a full report and accounting of the conduct of the provider's affairs during the rehabilitation and of the provider's current financial condition, terminate the rehabilitation and, by order, return the facility or facilities owned by, or operated by, the provider, along with the assets and affairs of the provider, to the provider's management.

(d), (e) Repealed by Session Laws 1995 (Regular Session, 1996), c. 582, s. 3.

(f) In applying for an order to rehabilitate or liquidate a provider, the Commissioner shall give due consideration in the application to the manner in which the welfare of persons who have previously contracted with the provider for continuing care may be best served.

(g) An order for rehabilitation shall be refused or vacated if the provider posts a bond, by a recognized surety authorized to do business in this State and executed in favor of the Commissioner on behalf of persons who may be found entitled to a refund of entrance fees from the provider or other damages in the event the provider is unable to fulfill its contracts to provide continuing care at the facility or facilities, in an amount determined by the Court to be equal to the reserve funding that would otherwise need to be available to fulfill such obligations. (1989, c. 758, s. 1; 1995 (Reg. Sess., 1996), c. 582, s. 3; 2003-193, s. 10.)

§ 58-64-46. Receiverships; exception for facility beds.

When the Commissioner has been appointed as a receiver under Article 30 of this Chapter for a provider or facility subject to this Article, the Department of Health and Human Services may, notwithstanding any other provision of law, accept and approve the addition of adult care home beds for a facility owned by, or operated by, the provider, if it appears to the court, upon petition of the Commissioner or the provider, or on the court's own motion, that (i) the best interests of the provider or (ii) the welfare of persons who have previously contracted with the provider or may contract with the provider, may be best served by the addition of adult care home beds. (1999-219, s. 2; 2003-193, s. 11.)

§ 58-64-50. Investigations and subpoenas.

(a) The Commissioner may make such public or private investigations within or outside of this State as necessary (i) to determine whether any person has violated or is about to violate any provision of this Article, (ii) to aid in the enforcement of this Article, or (iii) to verify statements contained in any disclosure statement filed or delivered under this Article.

(b) For the purpose of any investigation or proceeding under this Article, the Commissioner may require or permit any person to file a statement in writing, under oath or otherwise, as to any of the facts and circumstances concerning the matter to be investigated.

(c) For the purpose of any investigation or proceeding under this Article, the Commissioner or his designee has all the powers given to him for insurance companies. He may administer oaths and affirmations, subpoena witnesses, compel their attendance, take evidence, and require the production of any books, papers, correspondence, memoranda, agreements, or other documents or records deemed relevant or material to the inquiry, all of which may be enforced in the Superior Court of Wake County. (1989, c. 758, s. 1.)

§ 58-64-55. Examinations; financial statements.

The Commissioner or the Commissioner's designee may, in the Commissioner's discretion, visit a provider offering continuing care in this State to examine its books and records. Expenses incurred by the Commissioner in conducting examinations under this section shall be paid by the provider examined. The provisions of G.S. 58-2-131, 58-2-132, 58-2-133, 58-2-134, 58-2-155, 58-2-165, 58-2-180, 58-2-185, 58-2-190, and 58-6-5 apply to this Article and are hereby incorporated by reference. (1989, c. 758, s. 1; 1995, c. 193, s. 53; 1999-132, s. 11.9; 2003-193, s. 12.)

§ 58-64-60. Contracts as preferred claims on liquidation.

In the event of liquidation of a provider, all contracts for continuing care executed by the provider shall be deemed preferred claims against all assets owned by the provider; provided, however, such claims shall be subordinate to the liquidator's cost of administration or any secured claim. (1989, c. 758, s. 1; 1995 (Reg. Sess., 1996), c. 582, s. 4; 2003-193, s. 13.)

§ 58-64-65. Rule-making authority; reasonable time to comply with rules.

(a) The Commissioner is authorized to promulgate rules to carry out and enforce the provisions of this Article.

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(b) Any provider who is offering continuing care may be given a reasonable time, not to exceed one year from the date of publication of any applicable rules promulgated pursuant to this Article, within which to comply with the rules. (1989, c. 758, s. 1; 2003-193, s. 14.)

§ 58-64-70. Civil liability.

(a) A provider who enters into a contract for continuing care at a facility without having first delivered a disclosure statement meeting the requirements of G.S. 58-64-20 to the person contracting for this continuing care, or enters into a contract for continuing care at a facility with a person who has relied on a disclosure statement that omits to state a material fact required to be stated therein or necessary in order to make the statements made therein, in light of the circumstances under which they are made, not misleading, shall be liable to the person contracting for this continuing care for actual damages and repayment of all fees paid to the provider violating this Article, less the reasonable value of care and lodging provided to the resident by or on whose behalf the contract for continuing care was entered into prior to discovery of the violation, misstatement, or omission or the time the violation, misstatement, or omission should reasonably have been discovered, together with interest thereon at the legal rate for judgments, and court costs and reasonable attorney fees.

(b) Liability under this section exists regardless of whether the provider had actual knowledge of the misstatement or omission.

(c) A person may not file or maintain an action under this section if the person, before filing the action, received a written offer of a refund of all amounts paid the provider, together with interest at the rate established monthly by the Commissioner of Banks pursuant to G.S. 24-1.1(c), less the current contractual value of care and lodging provided prior to receipt of the offer, and if the offer recited the provisions of this section and the recipient of the offer failed to accept it within 30 days of actual receipt.

(d) An action may not be maintained to enforce a liability created under this Article unless brought before the expiration of three years after the execution of the contract for continuing care that gave rise to the violation. (1989, c. 758, s. 1; 1995, c. 193, s. 54; 2003-193, s. 15.)

§ 58-64-75. Criminal penalties.

Any person who willfully and knowingly violates any provision of this Article is guilty of a Class 1 misdemeanor. The Commissioner may refer such evidence as is available concerning violation of the Article or of any rule or order hereunder to the Attorney General or a district attorney who may, with or without such reference institute the appropriate criminal proceedings under this Article. Nothing in this Article limits the power of the State to punish any person for any conduct that constitutes a crime under any other statute. (1989, c. 758, s. 1; 1993, c. 539, s. 469; 1994, Ex. Sess., c. 24, s. 14(c).)

§ 58-64-80. Advisory Committee.

There shall be a nine member Continuing Care Advisory Committee appointed by the Commissioner. The Committee shall consist of at least two residents of facilities, two representatives of LeadingAge North Carolina, one individual who is a certified public accountant and is licensed to practice in this State, one individual skilled in the field of architecture or engineering, and one individual who is a health care professional. (1989, c. 758, s. 1; 1999-132, s. 2.5; 2015-281, s. 8.)

§ 58-64-85. Other licensing or regulation.

(a) Nothing in this Article affects the authority of the Department of Health and Human Services or any successor agency otherwise provided by law to license or regulate any health service facility or domiciliary service facility.

(b) Facilities and providers licensed under this Article that also are subject to the provisions of the North Carolina Condominium Act under Chapter 47C of the General Statutes shall not be subject to the provisions of Chapter 39A of the General Statutes, provided that the facility's declaration of condominium does not require the payment of any fee or charge not otherwise provided for in a resident's contract for continuing care, or other separate contract for the provisions of membership or services. (1991, c. 720, s. 1; 1997-443, s. 11A.118(a); 2011-196, s. 13.)

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SUBCHAPTER 11H - CONTINUING CARE FACILITIES

11 NCAC 11H .0101 DEFINITIONS

- (a) As used in this Section, unless the context clearly indicates otherwise:
- (1) "Break-even" means confirmation of sufficient executed resident's agreements to assure the facility's financial stability and which further indicate that projected revenues will at least be equal to projected expenses.
 - (2) "Health related services" also means domiciliary (rest home) care or Homes for the Aged, skilled or intermediate nursing, nursing home or rest home admission, or priority admission into a facility, unit, or bed providing any of the above-named services.
 - (3) "Lodging" means independent living without the need or use of health related services.
- (b) The definitions contained in G.S. 58-64-1 are incorporated into this Section by reference.

History Note: Authority G.S. 58-2-40; 58-64-1; 58-64-65;
 Eff. June 1, 1993;
 Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0102 LICENSE - STEPS

An applicant shall apply for licensure in accordance with the following steps:

- (1) For new or development stage facilities:
 - (a) The applicant shall initially submit the following items to the Commissioner for review:
 - (i) The applicant's name, address and telephone number;
 - (ii) A copy of a non-binding reservation agreement form;
 - (iii) Escrow agreement;
 - (iv) Narrative describing the facility, its mode of operation, and its location; and
 - (v) Any advertising materials to be used.
 - (b) Upon completion of step (1)(a), the applicant may:
 - (i) Disseminate materials describing the intent to develop a Continuing Care facility; and
 - (ii) Enter into fully refundable non-binding reservation agreements for up to one thousand dollars (\$1,000.00). All funds received shall be escrowed.
- (2) Start-Up Certificate:
 - (a) In order to obtain a Start-Up Certificate, the applicant or provider shall submit the following to the Commissioner for review:
 - (i) Application for Licensure, as required by G.S. 58-64-5(b);
 - (ii) A Disclosure Statement, as required by G.S. 58-64-20;
 - (iii) A copy of a binding reservation agreement or resident agreement; and
 - (iv) A market feasibility study.
 - (b) Upon issuance of the Start-Up Certificate, the applicant or provider may:
 - (i) Enter into binding; reservation agreements or resident agreements;
 - (ii) Accept entrance fees and entrance fee deposits over one thousand dollars (\$1,000.00). Any funds received shall be escrowed and shall be released only in accordance with G.S. 58-64-35;
 - (iii) Begin site preparation work; and
 - (iv) Construct model units for marketing.
- (3) Preliminary Certificate:
 - (a) In order to obtain a Preliminary Certificate, the applicant or provider shall submit the following to the Commissioner for review:
 - (i) An explanation of any material differences between actual costs and projected costs contained in the Start-Up Certificate submission (not required for existing operational Continuing Care facilities that are expanding);
 - (ii) An updated Disclosure Statement;

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- (iii) Current interim financial statements; and
- (iv) Confirmation of signed agreements for at least 50 percent of the new units, reserved by a deposit equal to at least 10 percent of the entrance fee or by a non-refundable deposit equal to the periodic fee for at least two months for facilities that have no entrance fee. Applicants that do not accept presale entrance fees shall place a deposit with the Commissioner. The deposit shall be either one hundred dollars (\$100.00) for each unit for 50 percent of the total proposed units, or one hundred thousand dollars (\$100,000), whichever amount is more. The deposit shall be made in accordance with G.S. 58-5-20. The deposit shall be refunded to the applicant upon receipt of a permanent license.
- (b) Upon issuance of the Preliminary Certificate, the applicant or provider may:
 - (i) Purchase or construct a Continuing Care facility;
 - (ii) Renovate or develop structure(s) not already licensed as a Continuing Care facility; and
 - (iii) Expand existing Continuing Care facilities in excess of 10 percent of the current number of available Independent Living Units (ILU's) or available health related units/beds.
- (4) Permanent License:
 - (a) In order to obtain a Permanent License, the applicant or provider shall submit the following to the Commissioner for review at least 60 days before the facility opening:
 - (i) An updated Application for Licensure;
 - (ii) An updated Disclosure Statement; and
 - (iii) Confirmation of signed agreements for new units required by the Continuing Care facility to break-even, reserved by a deposit equal to at least 10 percent of the entrance fee or by a non-refundable deposit equal to the periodic fee for at least two months for facilities that have no entrance fee.
 - (b) Upon issuance of the Permanent License and satisfaction of all other legal requirements, the applicant or provider may:
 - (i) Open the Continuing Care facility; and
 - (ii) Provide Continuing Care.
- (5) Restricted or Conditional License:
 - (a) If all other licensing requirements are met, the Commissioner shall, in lieu of denying the issuance of a Permanent License, issue a Restricted or Conditional License to an applicant when one or more of the following conditions exist:
 - (i) A hazardous financial condition.
 - (ii) Occupancy at the facility, or the number of executed agreements for new units at the facility, is below the level at which the facility would break-even.
 - (b) Upon issuance of the Restricted or Conditional License, the provider may operate the facility under the conditions or restrictions established by the Commissioner until such time as the Commissioner alters the conditions for continued operations or issues a Permanent License.
 - (c) Upon issuance of the Restricted or Conditional License, the provider shall file with the Commissioner quarterly financial statements and an occupancy report. These shall be due no later than 45 days following the end of each fiscal quarter.

History Note: Authority G.S. 58-2-40; 58-64-5; 58-64-65; Eff. April 1, 1993; Amended Eff. September 1, 2007; July 1, 2004; Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

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11 NCAC 11H .0103 REVOCATION OF LICENSE

The revocation process, as provided by G.S. 58-64-10, shall also apply to the Start-Up Certificate, the Preliminary Certificate, and the Restricted or Conditional License.

History Note: Authority G.S. 58-2-40; 58-64-10; 58-64-65;
Eff. April 1, 1993;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0104 SALE OR TRANSFER OF OWNERSHIP

The sale or transfer process, as provided by G.S. 58-64-15, shall also apply to the Start-Up Certificate, the Preliminary Certificate, and the Restricted or Conditional License.

History Note: Authority G.S. 58-2-40; 58-64-15; 58-64-65;
Eff. April 1, 1993;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0105 STANDARDIZED DISCLOSURE STATEMENT FORMAT

As per G.S. 58-64-20(d), the Commissioner may prescribe a standardized format for the Disclosure Statement. The format shall be maintained by the Commissioner, and may be updated as necessary.

History Note: Authority G.S. 58-2-40; 58-64-20; 58-64-65;
Eff. April 1, 1993;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0106 HEALTH AND FINANCIAL CONDITIONS FOR ACCEPTANCE

The health and financial conditions for acceptance as a resident shall appear within the Disclosure Statement, as provided by G.S. 58-64-20(a)(8). The Disclosure Statement shall also include any conditions related to the acceptance conditions required by the provider or facility, such as age, ability to move or communicate, minimum assistance levels necessary to perform daily activities, prepared wills, and ability to pay under specified conditions.

History Note: Authority G.S. 58-2-40; 58-64-20; 58-64-65;
Eff. April 1, 1993;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0107 FINANCIAL STATEMENTS AND COMPILED FIVE YEAR FORECASTS

Certified financial statements, as required by G.S. 58-64-20(a)(10), and compiled five year forecasts, as required by G.S. 58-64-20(a)(12), shall be of the provider's corporation or other legal entity that owns the Continuing Care facility. The Commissioner may also require the provider to supply supplementary financial data or other appropriate disclosure under the requirements of G.S. 58-64-20(a)(10) and G.S. 58-64-20(a)(12) on individual Continuing Care facilities, where a corporation or other legal entity owns various Continuing Care facilities or is engaged in various enterprises.

History Note: Authority G.S. 58-2-40; 58-64-20; 58-64-65;
Eff. April 1, 1993;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

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11 NCAC 11H .0108 COMPILED FIVE YEAR FORECAST

- (a) The compiled five year forecast shall consist of the following:
- (1) a balance sheet;
 - (2) a statement of operations;
 - (3) a statement of cash flows; and
 - (4) a narrative detailing all significant assumptions.
- (b) The balance sheet shall include individual categories or line items that sum into the following sub-totals, at a minimum:
- (1) current assets;
 - (2) restricted assets, including a line item for operating reserve assets;
 - (3) fixed assets, including property, plant, and equipment;
 - (4) total assets;
 - (5) current liabilities;
 - (6) long-term debt;
 - (7) total liabilities;
 - (8) deferred revenue-refundable;
 - (9) deferred revenue-nonrefundable;
 - (10) equity or fund balance-unrestricted; and
 - (11) equity or fund balance-restricted.
- (c) The statement of operations shall include the following individual categories or line items, at a minimum:
- (1) monthly fee revenues;
 - (2) amortization of entrance fees;
 - (3) health care revenues;
 - (4) investment/interest income;
 - (5) contributions/gifts;
 - (6) health care expenses;
 - (7) operations expenses, consisting of at least maintenance, laundry, and housekeeping;
 - (8) dietary expenses;
 - (9) administrative expenses;
 - (10) interest expenses; and
 - (11) depreciation.

History Note: Authority G.S. 58-2-40; 58-64-20; 58-64-65;
 Eff. April 1, 1993;
 Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0109 PROPOSED OR DEVELOPMENT STAGE FACILITIES

The Commissioner may apply all or part of G.S. 58-64-20(a)(14) to existing Continuing Care facilities that are expanding.

History Note: Authority G.S. 58-2-40; 58-64-20; 58-64-65;
 Eff. April 1, 1993;
 Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0110 CONTRACT SPECIFICATION - LIVING UNIT

A "living unit," as described in G.S. 58-64-25(a)(2), means an independent living unit or a health care unit/bed, or as otherwise defined by the annual North Carolina State Medical Facilities Plan.

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History Note: Authority G.S. 58-2-40; 58-64-25; 58-64-65;
Eff. April 1, 1993;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.

11 NCAC 11H .0111 INSOLVENCY OR HAZARDOUS FINANCIAL CONDITION

(a) A negative fund balance is a financial position of a provider or facility in which the assets of a provider or facility do not exceed its liabilities, as required under generally accepted accounting principles. The Commissioner may deem a provider or facility that has a negative fund balance to be insolvent or in imminent danger of becoming insolvent if any of the following hazardous financial condition standards or factors are applicable or present:

- (1) There are findings or conditions reported in the provider's or facility's financial statements that the Commissioner determines to be adverse to the financial stability of the provider or facility.
- (2) The current or projected ratios of total assets, including required reserve levels, to total liabilities indicate an impairment or a deterioration of the provider's or facility's operations or equity; or demonstrate a trend that could lead to an impairment or a deterioration of the provider's or facility's operations, working capital, or equity.
- (3) The current or projected ratios of current assets to current liabilities indicate an impairment or a deterioration of the provider's or facility's operations, working capital, or equity; or demonstrate a trend that could lead to an impairment or a deterioration of the provider's or facility's operations, working capital, or equity.
- (4) The provider or facility is unable to perform normal daily activities and meet its obligations as they become due, considering the provider's or facility's current or projected cash flow and liquidity position.
- (5) The provider's or facility's operating losses for the past year or projected operating losses are of such magnitude as to jeopardize normal daily activities or continued provider or facility operations.
- (6) The insolvency of an affiliated provider or facility or other affiliated person results in legal liability of the provider or facility for payments and expenses of such magnitude as to jeopardize the provider's or facility's ability to meet its obligations as they become due, without substantial disposition of assets outside the ordinary course of business, any restructuring of debt, or externally forced revisions of its operations.
- (7) The provider or facility has receivables that are more than 90 days old.
- (8) The insolvency is not temporary and the provider or facility cannot demonstrate that the insolvency is materially reduced or eliminated.
- (9) There is an adverse effect on the provider or facility of reporting entrance fees as deferred revenues, with consideration given to all reporting requirements required under generally accepted accounting principles and the ultimate net income component of those revenues.
- (10) A start-up provider or facility or any operational provider or facility undergoing plant expansion or refinancing of its debt has a financial condition as a result of such action that could otherwise seriously jeopardize present or future operations.

(b) The provider or facility shall prepare a plan to address and correct any condition that has led to a determination of insolvency or imminent danger of insolvency by the Commissioner. The plan must be presented to the Commissioner within 90 days after the date of the insolvency determination. If the plan to correct the condition is disapproved by the Commissioner, the plan does not correct the condition leading to the Commissioner's determination of insolvency, or the provider's or facility's hazardous condition is such that it cannot be significantly corrected or eliminated, the Commissioner may then proceed under G.S. 58-64-10 or G.S. 58-64-45.

History Note: Authority G.S. 58-2-40; 58-64-10; 58-64-45; 58-64-65;
Eff. January 1, 1994;
Pursuant to G.S. 150B-21.3A, rule is necessary without substantive public interest Eff. December 20, 2015.