The N.C. Department of Insurance is proud to present the 2021 edition of its North Carolina Department of Insurance Continuing Care Retirement Communities Reference Guide.

This guide has been compiled by the Department 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 care for older adults under a contract that lasts 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 CCRC to an individual who has entered into a continuing care contract but prefers to remain in their home and may opt to receive on-site lodging at a future date.

North Carolina’s continuing care laws give the consumer full disclosure about a continuing care community prior to the execution of a contract so the consumer can understand the process better.

We urge consumers to read the disclosure statement and the contract provided to you by a continuing care provider and to please ask questions if you are unsure of any of the provisions contained in them.

And – please, if necessary – seek professional advice from an attorney and/or accountant if you don’t understand.

For any questions, please contact the Financial Analysis and Receivership Division, Special Entities Section of the N.C. Department of Insurance at 919-807-6612.
TABLE OF CONTENTS
CCRC REFERENCE GUIDE 2021

Introduction I
Map V

COMMUNITIES
Abernethy Laurels 1
Aldersgate 2
Arbor Acres 3
Ardenwoods 4
Belle Meade and Pine Knoll at Saint Joseph of the Pines 5
Brookdale Carriage Club Providence 6
Brookridge Retirement Community 7
Brooks-Howell Home 8
Carmel Hills 9
Carol Woods 10
Carolina Bay at Autumn Hall 11
Carolina Meadows Retirement Community 12
Carolina Village 13
Covenant Village 14
Croasdaile Village Retirement Community 15
Cypress Glen Retirement Community 16
Deerfield Episcopal Retirement Community 17
Friends Homes 18
Galloway Ridge at Fearrington 19
Givens Estates 20
Givens Highland Farms 21
Glenaire 22
Grace Ridge Retirement Community 23
Matthews Glen 24
Oak Creek Apartments 25
Penick Village 26
Pennybyrn at Maryfield 27
Piedmont Crossing 28
Pisgah Valley Retirement Community 29
Pittsboro Christian Village 30
Plantation Village 31
Quail Haven Village 32
River Landing at Sandy Ridge 33
# TABLE OF CONTENTS

## CCRC REFERENCE GUIDE 2021

<table>
<thead>
<tr>
<th>Community</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salemtowne</td>
<td>34</td>
</tr>
<tr>
<td>Scotia Village Retirement Community</td>
<td>35</td>
</tr>
<tr>
<td>Searstone</td>
<td>36</td>
</tr>
<tr>
<td>Sharon Towers</td>
<td>37</td>
</tr>
<tr>
<td>Sharon Village Apartments</td>
<td>38</td>
</tr>
<tr>
<td>Southminster</td>
<td>39</td>
</tr>
<tr>
<td>Springmoor Life Care Retirement Community</td>
<td>40</td>
</tr>
<tr>
<td>Stanley Total Living Center</td>
<td>41</td>
</tr>
<tr>
<td>The Barclay at SouthPark</td>
<td>42</td>
</tr>
<tr>
<td>The Cardinal at North Hills</td>
<td>43</td>
</tr>
<tr>
<td>The Cedars of Chapel Hill</td>
<td>44</td>
</tr>
<tr>
<td>The Cypress of Charlotte</td>
<td>45</td>
</tr>
<tr>
<td>The Cypress of Raleigh</td>
<td>46</td>
</tr>
<tr>
<td>The Forest at Duke</td>
<td>47</td>
</tr>
<tr>
<td>The Gardens of Taylor Glen</td>
<td>48</td>
</tr>
<tr>
<td>The Oaks at Whitaker Glen</td>
<td>49</td>
</tr>
<tr>
<td>The Pines at Davidson</td>
<td>50</td>
</tr>
<tr>
<td>The Templeton of Cary</td>
<td>51</td>
</tr>
<tr>
<td>The Village at Brookwood</td>
<td>52</td>
</tr>
<tr>
<td>Trinity Oaks</td>
<td>53</td>
</tr>
<tr>
<td>Tyron Estates</td>
<td>54</td>
</tr>
<tr>
<td>Twin Lakes Community</td>
<td>55</td>
</tr>
<tr>
<td>Well-Spring Retirement Community</td>
<td>56</td>
</tr>
<tr>
<td>Wesley Pines, A Life Plan Community</td>
<td>57</td>
</tr>
<tr>
<td>White Oak Village Apartments</td>
<td>58</td>
</tr>
<tr>
<td>Whitestone: A Masonic and Eastern Star Community</td>
<td>59</td>
</tr>
<tr>
<td>Windsor Point</td>
<td>60</td>
</tr>
<tr>
<td>Windsor Run</td>
<td>61</td>
</tr>
</tbody>
</table>

## APPENDICES

- **Appendix 1** - Summary of Contract and Refund Options
- **Appendix 2** - Summary of Other Services/Features
- **Appendix 3** - Occupancy Summary
- **Appendix 4** - CCRC's by County
- **Appendix 5** - NC Department of Insurance Seniors Health Insurance Information Program
- **Appendix 6** - N.C.G.S. Chapter 58 Article 64, Continuing Care Retirement Communities
- **Appendix 7** - N.C.A.C Subchapter 11H, Continuing Care Facilities
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.

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, 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 living unit 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 $68,000 to $370,000. 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. Entrance fees that are fully refundable are typically more expensive than those that are partially refundable or refundable on a declining basis.

2. **Partial Refund** – Partially refundable entrance 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.
3. Declining Refund – With this type of refund, the contract 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 $8,000. However, monthly fees will typically fall within the $2,000 to $4,000 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. § 58-64-20 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.gov/documents-disclosures).

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 health related 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. Health-related 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
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 usually require no entrance fee but include, at a minimum, preferred or priority access to health-related services at 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 CCRC.

**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 North Carolina 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 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 can be found on the NC Department of Insurance website at https://www.ncdoi.gov/insurance-industry/continuing-care-retirement-communities-ccrc

**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 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.

Operating reserves can only be released upon the approval of the Commissioner.
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 June 2020. 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 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 Financial Analysis and Receivership Division, Special Entities Section, at (919) 807-6612 or (919) 807-6178, or by mail at the following address:

North Carolina Department of Insurance
Financial Analysis and Receivership 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
19 Galloway Ridge at Fearrington
20 Givens Estates
21 Givens Highland Farms
22 Glenaire
23 Grace Ridge Retirement Community
24 Matthews Glen
25 Oak Creek Apartments
26 Penick Village
27 Pennbyrn at Maryfield
28 Piedmont Crossing
29 Pisgah Valley Retirement Community
30 Pittsboro Christian Village
31 Plantation Village
32 Quail Haven Village
33 River Landing at Sandy Ridge
34 Salemtowne
35 Scotia Village Retirement Community
36 SearStone
37 Sharon Towers
38 Sharon Village Apartments
39 Southminster
40 Springmoor Life Care Retirement Community
41 Stanley Total Living Center
42 The Barclay at SouthPark
43 The Cardinal at North Hills
44 The Cedars of Chapel Hill
45 The Cypress of Charlotte
46 The Cypress of Raleigh
47 The Forest at Duke
48 The Gardens of Taylor Glen
49 The Oaks at Whitaker Glen
50 The Pines at Davidson
51 The Pines at SJP
52 The Pines at SJP
53 The Pines at SJP
54 The Pines at SJP
55 The Pines at SJP
56 Welden
57 Wilmington
Abernethy Laurels
Newton

Address: 102 Leonard Avenue
City: Newton
State: NC
Zip Code: 28658-9649
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 is home to a team of skilled professionals committed to serving older adults. We are a licensed, 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 homes with spacious floor plans and outdoor living spaces in cottages, villas, and apartments. Our fee-for-service approach to community living, where residents make their own selection of services, is tailored to make living easy, enjoyable, and stimulating. Residents are free to enjoy life's adventures without the responsibility of home maintenance and relax in the comfort of knowing that additional supportive services are available should they be needed. A primary hope for many seniors is to live independently; our 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, and enjoy the conveniences of the hair salon, libraries, game room, auditorium/chapel, 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 medication management.

Opened in 2019, Abernethy Laurel's Health & Rehabilitation Center focuses on the household model of care with 174 licensed nursing beds, which are all duly certified for participation for both Medicare and Medicaid. The design features both private and companion suites with private baths. Areas within the Health Center are dedicated for short-term or transitional rehabilitation, memory support, and long-term care. We provide a comprehensive approach to care and embrace life while furthering our mission: A Christian ministry committed to providing vibrant senior living opportunities, diverse programs of outreach and compassionate services.

FEES:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$28,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,514</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>189</td>
<td>156</td>
<td>196</td>
<td>82.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>174</td>
<td>148</td>
<td>148</td>
<td>85.1%</td>
</tr>
<tr>
<td>Total:</td>
<td>381</td>
<td>322</td>
<td>362</td>
<td>84.5%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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: 3800 Shamrock Drive |
| City: Charlotte |
| State: NC |
| Zip Code: 28215-3220 |
| 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: |
| Provider Tax Status: Not-For-Profit |

**Self Description:**

Aldersgate is an inclusive life plan community that has the mission to honor elders and is committed to creating and fostering diverse, caring communities where everyone has a voice and a value. Aldersgate is located on a beautiful 231-acre campus in historic East Charlotte. The full continuum of care is available at Aldersgate, from independent living apartments and cottages, newly constructed hybrid apartments and villas, to skilled nursing and memory care. Amenities include a fitness center, pool, walking trails, private stocked lake, azalea garden and more.

Aldersgate recently completed the final phase of Gateway Promise, which includes new, state-of-the-art accommodations and centers of service excellence. In 2016, Aldersgate completed an expansion of Cuthbertson Village memory support center, including a new 16-bed neighborhood and renovation of its Town Center. In the fall of 2017, construction was finished on a new 120-bed skilled nursing facility, which replaces the previous Asbury Care Center. The new care center is programed around the person-centered model of care, with six unique neighborhoods housing 20 persons each for short or long-term acute care and treatment and rehabilitation. Aldersgate accepts Medicare and insurance reimbursement for qualifying stays and therapy services.

Gateway Promise was realized with the completion of The Commons, which expanded culinary and social areas, as well as the 62 new hybrid apartments and villas. The expanded areas include 2 bars, game room, market-style dining, fine dining, coffee shop and ice cream parlor. A full salon and spa features services from hair and nails to massage.

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$94,450</td>
<td>$566,044</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,003</td>
<td>$5,443</td>
</tr>
</tbody>
</table>

**Note:**

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Extensive</td>
<td>☐ No Refund</td>
</tr>
<tr>
<td>☑ Modified</td>
<td>☑ Fully Declining Refund</td>
</tr>
<tr>
<td>☐ Fee for Service</td>
<td>☑ 50% Refund</td>
</tr>
<tr>
<td>☐ Equity</td>
<td>☐ 80% Refund</td>
</tr>
<tr>
<td>☑ Rental (No Entrance Fee)</td>
<td>☑ 90% Refund</td>
</tr>
<tr>
<td>☐ Assignment of Assets</td>
<td>☐ Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>309</td>
<td>273</td>
<td>362</td>
<td>88.3%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>112</td>
<td>108</td>
<td>110</td>
<td>96.4%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>120</td>
<td>113</td>
<td>113</td>
<td>94.2%</td>
</tr>
<tr>
<td>Total</td>
<td>541</td>
<td>494</td>
<td>585</td>
<td>91.3%</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
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 490 residents reside at this beautiful 82-acre campus in Independent Living, Assisted Living, and Skilled Nursing accommodations. The 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, apartments of various sizes, licensed assisted living areas (106 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 added a new dining venue and bistro bar in 2019.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$51,975</td>
<td>$520,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,870</td>
<td>$4,771</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

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

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

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>261</td>
<td>250</td>
<td>339</td>
<td>95.8%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>106</td>
<td>95</td>
<td>95</td>
<td>89.6%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>83</td>
<td>80</td>
<td>74</td>
<td>96.4%</td>
</tr>
<tr>
<td>Total:</td>
<td>450</td>
<td>425</td>
<td>508</td>
<td>94.4%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Ardenwoods

Address: 2400 Appalachian Boulevard
City: Arden
State: NC
Zip Code: 28704-8327
Phone Number: (828) 684-0041
Fax Number: (828) 684-7800
Toll Free Number:
County: Buncombe
Web Page: www.ardenwoodsretire.com
Year Opened: 2002
Licensed Provider: Arden Retirement LLC
Provider Tax Status: For-Profit

Self Description:
Ardenwoods is a continuing care retirement community located on 48 beautiful wooded acres approximately 12 miles south of Asheville, NC. It is conveniently located halfway between Hendersonville and Asheville. Residences available include one-, two-, and three-bedroom apartments with full kitchens and one or two baths. The community’s assisted living facility is referred to as Heather Glen and is licensed for 60 residents. Wi-Fi is available throughout the campus and the residences are equipped with a wireless emergency call system for added safety.

The community clubhouse includes an indoor heated pool, state of the art fitness center, library with computer center, creative arts studio, beauty/barber salon, casual dining grille, and a dining room with a large stone fireplace and breathtaking views.

Outdoor amenities include nature trails, raised gardens, putting green and shuffleboard.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$176,000</td>
<td>$334,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,651</td>
<td>$3,348</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>92</td>
<td>86</td>
<td>107</td>
<td>93.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>48</td>
<td>40</td>
<td>41</td>
<td>83.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Total:</td>
<td>140</td>
<td>126</td>
<td>148</td>
<td>90.0%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.
Belle Meade and Pine Knoll are continuing care retirement communities located in Southern Pines, North Carolina. Both communities offer a secure environment, and extensive health care services through the nearby Coventry (assisted living with memory support services), Family Care Home (assisted living) and Health Center (skilled nursing facility with memory support and rehabilitation services). Residents can enjoy privileges at eight area premier golf courses.

**Address:**
100 Gosman Drive, Suite B

**City:**
Southern Pines

**State:**
NC

**Zip Code:**
28387

**Phone Number:**
(910) 246-3060

**Fax Number:**
(910) 246-0178

**Toll Free Number:**
(800) 343-7463

**County:**
Moore

**Web Page:**
www.sjp.org

**Year Opened:**
1984

**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 communities offer a secure environment, and extensive health care services through the nearby Coventry (assisted living with memory support services), Family Care Home (assisted living) and Health Center (skilled nursing facility with memory support and rehabilitation services). Residents can enjoy privileges at eight area premier golf courses.

**FEES:**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$52,223</td>
<td>$364,533</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,767</td>
<td>$6,358</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:**

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

**OCCUPANCY:**

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>310</td>
<td>257</td>
<td>324</td>
<td>82.9%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>78</td>
<td>55</td>
<td>57</td>
<td>70.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>176</td>
<td>149</td>
<td>149</td>
<td>84.7%</td>
</tr>
<tr>
<td>Total:</td>
<td>564</td>
<td>461</td>
<td>530</td>
<td>81.7%</td>
</tr>
</tbody>
</table>

**OTHER:**

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Brookdale Carriage Club Providence

Address: 5800 Old Providence Road
City: Charlotte
State: NC
Zip Code: 28226-6872
Phone Number: (704) 365-8551
Fax Number: (704) 366-4270
Toll Free Number: (877) 225-2831
County: Mecklenburg
Web Page: www.brookdale.com
Year Opened: 1988
Licensed Provider: ARCLP - Charlotte, LLC

Self Description:
The Company is an owner and operator of a senior living community (the “Community”) located on a 45-acre site at 5800 Old Providence Road in Charlotte, North Carolina consisting of ten apartment buildings (one, two, and three story) and seven four-plex villas with two large lakes in the center of the Community. The Company is committed to providing senior living solutions and an exceptional living experience through a property that is designed, purpose-built and operated to provide the highest quality service, care and living accommodations for residents. The Community offers a variety of living arrangements and services to accommodate all levels of physical ability and health. The Community has 275 independent living units, 56 assisted living units, 34 memory care units, and 42 skilled nursing beds on one campus.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,745</td>
<td>$8,095</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:
- Extensive  No Refund
- Modified  Fully Declining Refund
- Fee for Service  50% Refund
- Equity  80% Refund
- Rental (No Entrance Fee)  90% Refund
- Assignment of Assets  Full Refund

CONTRACT AND REFUND OPTIONS:

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>275</td>
<td>236</td>
<td>273</td>
<td>85.8%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>90</td>
<td>80</td>
<td>81</td>
<td>88.9%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>42</td>
<td>22</td>
<td>22</td>
<td>52.4%</td>
</tr>
<tr>
<td>Total:</td>
<td>407</td>
<td>338</td>
<td>376</td>
<td>83.0%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance

6
Brookridge Retirement Community

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: Forsyth
County: County:
Web Page: www.brookridgecommunity.org
Year Opened: 1989
Licensed Provider: Baptist Retirement Homes of North Carolina, Incorporated
Provider Tax Status: Not-For-Profit

Self Description:
Brookridge is a life plan community in the heart of Winston-Salem that offers vibrant independent living, engaged assisted living, person-centered memory care, and skilled medical and nursing care. As part of the Baptist Retirement Homes (BRH) family, our commitment to quality care and meaningful living is an opportunity every one of our residents deserves at Brookridge. BRH is a faith-based, not-for-profit organization with a 70-year old legacy of excellence, providing older adults with a second-to-none senior living experience rooted in our core values.

Our community offers garden homes and apartments for a carefree lifestyle in a vibrant community with full-service amenities. Residents enjoy maintenance-free living, campus and community activities, camaraderie, and more. Private, assisted living rooms in the Prince Nursing Care Center are for individuals who need assistance with daily living tasks. The Kulynych Memory-Enhanced Residence is a private 10-room area designed for those dealing with dementia-related disorders. Short-term rehab helps residents get back on their feet. If residents require 24-hour attention, our high-quality healthcare centers offer personalized care plans to meet these needs.

Fees:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$40,967</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,400</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

Occupancy:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>137</td>
<td>82</td>
<td>105</td>
<td>59.9%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>36</td>
<td>30</td>
<td>30</td>
<td>83.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>77</td>
<td>56</td>
<td>56</td>
<td>72.7%</td>
</tr>
<tr>
<td>Total:</td>
<td>250</td>
<td>168</td>
<td>191</td>
<td>67.2%</td>
</tr>
</tbody>
</table>

Other:

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

North Carolina Department of Insurance
Brooks-Howell Home

Address: 256 Merrimon Avenue
City: Asheville
State: NC
Zip Code: 28801-
Phone Number: (828) 253-6712
Fax Number: (828) 367-7978
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

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$100,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,632</td>
<td>$2,833</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>61</td>
<td>25</td>
<td>34</td>
<td>41.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>58</td>
<td>37</td>
<td>44</td>
<td>63.8%</td>
</tr>
<tr>
<td>Total:</td>
<td>119</td>
<td>62</td>
<td>78</td>
<td>52.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

Self Description:

Brooks-Howell is located in the beautiful mountains of Asheville, North Carolina. We are one-mile north of downtown Asheville but have the feeling of being tucked away. An oasis, in an urban environment.

Community amenities include:
- Heated pool
- Chapel that accommodates 200 people
- Guest rooms
- Community dining venue
- Access to gym equipment
- Onsite full-service beauty salon
- Sewing room
- Ornamental rose garden and community gardens
- Onsite greenhouse
- Walking trails
- Media Center / Theater Room
- International Room featuring artifacts from 5 continents
- Comprehensive library and reading room
- Activity / Recreation Center
- Outpatient therapy services
- On-site medical clinic and pharmacy services
- Transportation for shopping and medical appointments

Brooks-Howell is owned and supported by the United Methodist Women of the United Methodist Church. We are open to:

- United Methodist Deaconesses, Home Missioners and Missionaries, United Methodist Women Directors and Staff, United Methodist Church service workers who have served the church for a minimum of 10 years, United Methodist Clergy and Spouses, United Methodist Church and Community Workers, United Methodist Church World Services Personnel and Staff, GBGM Mission Personnel and Staff Volunteers in Mission Personnel, Staff Volunteers in Mission with 10 or more years of volunteer service, Members of other Mission Boards with United Methodist relationships, Mission Personnel from other denominations approved on a case-by-case basis. Others approved by referral program.

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>61</td>
<td>25</td>
<td>34</td>
<td>41.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>58</td>
<td>37</td>
<td>44</td>
<td>63.8%</td>
</tr>
<tr>
<td>Total:</td>
<td>119</td>
<td>62</td>
<td>78</td>
<td>52.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Carmel Hills

Address: 2801 Carmel Road
City: Charlotte
State: NC
Zip Code: 28226-6382
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.

Self Description:
Our facilities are located on 15 acres of land on Carmel Road in southeast Charlotte, North Carolina. The property includes a one-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, 30 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$95,022</td>
<td>$229,239</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,489</td>
<td>$2,074</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Extensive</td>
<td>[ ] No Refund</td>
</tr>
<tr>
<td>[x] Modified</td>
<td>[x] Fully Declining Refund</td>
</tr>
<tr>
<td>[x] Fee for Service</td>
<td>[x] 50% Refund</td>
</tr>
<tr>
<td>[x] Equity</td>
<td>[ ] 80% Refund</td>
</tr>
<tr>
<td>[ ] Rental (No Entrance Fee)</td>
<td>[x] 90% Refund</td>
</tr>
<tr>
<td>[ ] Assignment of Assets</td>
<td>[ ] Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>41</td>
<td>36</td>
<td>41</td>
<td>87.8%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>38</td>
<td>23</td>
<td>23</td>
<td>60.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Total:</td>
<td>79</td>
<td>59</td>
<td>64</td>
<td>74.7%</td>
</tr>
</tbody>
</table>

OTHER:

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

Address: 750 Weaver Dairy Road
City: Chapel Hill
State: NC
Zip Code: 27514-1438
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:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$99,900</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,413</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Extensive</td>
<td>☐ No Refund</td>
</tr>
<tr>
<td>☑ Modified</td>
<td>☑ Fully Declining Refund</td>
</tr>
<tr>
<td>☐ Fee for Service</td>
<td>☐ 50% Refund</td>
</tr>
<tr>
<td>☐ Equity</td>
<td>☐ 80% Refund</td>
</tr>
<tr>
<td>☐ Rental (No Entrance Fee)</td>
<td>☐ 90% Refund</td>
</tr>
<tr>
<td>☐ Assignment of Assets</td>
<td>☐ Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>315</td>
<td>300</td>
<td>593</td>
<td>95.2%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>89</td>
<td>78</td>
<td>78</td>
<td>87.6%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>30</td>
<td>21</td>
<td>21</td>
<td>70.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>434</td>
<td>399</td>
<td>692</td>
<td>91.9%</td>
</tr>
</tbody>
</table>

OTHER:

☐ Dementia Units Available    ☐ Medicaid Certified
☐ Direct Admission to Assisted Living  ☑ Medicare Certified
☐ Direct Admission to Nursing     ☐ Pets (some) Allowed
☑ Utilities (some or all) in Monthly Fees  ☑ Emergency Call System
☑ Waiting List for (some or all) Units  ☑ Swimming Pool/Spa/Sauna
☑ Resident(s) on the Board of Directors  ☑ Transportation Available
☑ Housekeeping (some or all) in Monthly Fees  ☑ Exercise Room or Programs
☑ Meals (some or all) in Monthly Fees    ☐ Undergoing Expansion
**Self Description:**
Carolina Bay at Autumn Hall is located in the Autumn Hall neighborhood in Wilmington, NC, only a few miles from the Atlantic Ocean. Opened in 2015, Carolina Bay at Autumn Hall is owned and operated by a joint venture between the Liberty Healthcare Group located in Wilmington, NC and a capital marketing company.

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. Amenities include multiple dining options, a pool and spa, 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 independent living apartments and garden flats and a healthcare center providing memory care, assisted living, and skilled nursing units.

**Fees:**

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Fees</td>
<td>$4,016</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

**Occupancy:**

<table>
<thead>
<tr>
<th>Units Type</th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>146</td>
<td>130</td>
<td>180</td>
<td>89.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>18</td>
<td>18</td>
<td>12</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>100.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>176</td>
<td>160</td>
<td>210</td>
<td>90.9%</td>
</tr>
</tbody>
</table>

**Other:***
- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
### Carolina Meadows Retirement Community

**Address:** 100 Carolina Meadows  
**City:** Chapel Hill  
**State:** NC  
**Zip Code:** 27517-8510  
**Phone Number:** (919) 942-4014  
**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

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$131,000</td>
<td>$694,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,880</td>
<td>$3,581</td>
</tr>
</tbody>
</table>

**Note:**  
- Fees listed have been provided by the community.  
- All fees listed are for reference and comparison purposes only.  
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th>Units</th>
<th>Occupied</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>448</td>
<td>428</td>
<td>724</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>95</td>
<td>66</td>
<td>66</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>90</td>
<td>70</td>
<td>70</td>
</tr>
<tr>
<td>Total:</td>
<td>633</td>
<td>564</td>
<td>860</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available  
- Direct Admission to Assisted Living  
- Direct Admission to Nursing  
- Utilities (some or all) in Monthly Fees  
- Waiting List for (some or all) Units  
- Resident(s) 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
Carolina Village

Address: 600 Carolina Village Road
City: Hendersonville
State: NC
Zip Code: 28792-2892
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:
Since opening in 1974, Carolina Village has been a not-for-profit type-A life care continuing care retirement community / life plan community. We offer retirees the peace of mind of lifetime care. Our mission is to provide housing, continuing life care, up-to-date service, and a pleasant, congenial social environment to encourage personal growth and community participations for people aged 62 and older without regard to race or religious persuasion. We offer the full continuum of care from independent living (409 apartments and cottages) to assisted living (60 private suites) and skilled nursing (58 Medicare-certified private rooms) on our campus. An energetic single-site community situated on 96 acres in the Blue Ridge Mountains, Carolina Village is located between the southern hubs of Asheville, NC and Greenville, SC.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$169,600</td>
<td>$402,100</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,115</td>
<td>$4,595</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Extensive</td>
<td>✓ No Refund</td>
</tr>
<tr>
<td>✓ Modified</td>
<td>✓ Fully Declining Refund</td>
</tr>
<tr>
<td>✓ Fee for Service</td>
<td>✓ 50% Refund</td>
</tr>
<tr>
<td>✓ Equity</td>
<td>✓ 80% Refund</td>
</tr>
<tr>
<td>✓ Rental (No Entrance Fee)</td>
<td>✓ 90% Refund</td>
</tr>
<tr>
<td>✓ Assignment of Assets</td>
<td>✓ Full Refund</td>
</tr>
<tr>
<td>✓ Dementia Units Available</td>
<td></td>
</tr>
<tr>
<td>✓ Direct Admission to Assisted Living</td>
<td></td>
</tr>
<tr>
<td>✓ Direct Admission to Nursing</td>
<td></td>
</tr>
<tr>
<td>✓ Utilities (some or all) in Monthly Fees</td>
<td></td>
</tr>
<tr>
<td>✓ Waiting List for (some or all) Units</td>
<td></td>
</tr>
<tr>
<td>✓ Resident(s) on the Board of Directors</td>
<td></td>
</tr>
<tr>
<td>✓ Housekeeping (some or all) in Monthly Fees</td>
<td></td>
</tr>
<tr>
<td>✓ Meals (some or all) in Monthly Fees</td>
<td></td>
</tr>
<tr>
<td>✓ Medicaid Certified</td>
<td>✓ Medicare Certified</td>
</tr>
<tr>
<td>✓ Pets (some) Allowed</td>
<td>✓ Emergency Call System</td>
</tr>
<tr>
<td>✓ Swimming Pool/Spa/Sauna</td>
<td>✓ Transportation Available</td>
</tr>
<tr>
<td>✓ Exercise Room or Programs</td>
<td></td>
</tr>
<tr>
<td>✓ Undergoing Expansion</td>
<td></td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>399</td>
<td>385</td>
<td>541</td>
<td>96.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>60</td>
<td>54</td>
<td>54</td>
<td>90.0%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>58</td>
<td>41</td>
<td>41</td>
<td>70.7%</td>
</tr>
<tr>
<td>Total</td>
<td>517</td>
<td>480</td>
<td>636</td>
<td>92.8%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
### Covenant Village

**Address:** 1351 Robinwood Road  
**City:** Gastonia  
**State:** NC  
**Zip Code:** 28054-1631  
**Phone Number:** (704) 867-2319  
**Fax Number:** (704) 854-8738  
**Toll Free Number:**  
**County:** Gaston  
**Web Page:** www.covenantvillagenc.com  
**Year Opened:** 1982  
**Licensed Provider:** Covenant Village, Inc.  
**Provider Tax Status:** Not-For-Profit

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$40,000</td>
<td>$375,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,728</td>
<td>$6,106</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:**
- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>182</td>
<td>173</td>
<td>209</td>
<td>95.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>42</td>
<td>35</td>
<td>35</td>
<td>83.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>38</td>
<td>30</td>
<td>30</td>
<td>78.9%</td>
</tr>
<tr>
<td>Total:</td>
<td>262</td>
<td>238</td>
<td>274</td>
<td>90.8%</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Croasdaile Village Retirement Community

Address: 2500 Croasdaile Farm Parkway
City: Durham
State: NC
Zip Code: 27705-1332
Phone Number: (919) 384-2000
Fax Number: (919) 384-2480
Toll Free Number: (800) 960-7737
County: Durham
Web Page: www.croasdailevillage.org
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 100 acres in the Croasdaile Farm planned residential development in northwest Durham. It is a community of the United Methodist Retirement Homes, Inc. and is managed by Life Care Services. Croasdaile Village is just minutes away from Duke University and Duke University Medical Center.

The independent living residence consists of 135 duplex cottages, 245 apartments in the Homestead, and 24 additional Park Home apartments. Our intention is to build 54 additional apartments to be completed in 2023. The assisted living community expansion, once complete in 2021, will increase from 36 to 62 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 Homestead Apartment Building includes common amenities, including the wellness clinic that is Medicare certified, arts and crafts center, classrooms, a game room, and several card/recreation rooms. The Village Commons community center offers a library, multi-purpose room, resident activity room, theater/auditorium, wellness facilities, aquatic center, lobby/living rooms, beauty salon/spa, outdoor courtyard and multiple dining venues of which residents can enjoy restaurant-style dining for any of the three meals prepared daily. Croasdaile Village has a chapel for worship services. Administrative offices are also located in the Village Commons. In addition, we have built a new therapy gym with a water-therapy pool.

Our attentive team takes care of household and maintenance chores, so residents have more time for family, friends, and favorite activities.

Residents feel “at home” in the friendly, supportive environment at Croasdaile Village. For the past 21 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$55,896</td>
<td>$364,455</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,873</td>
<td>$5,469</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents Units</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>460</td>
<td>440</td>
<td>596</td>
<td>95.7%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>30</td>
<td>28</td>
<td>28</td>
<td>93.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>110</td>
<td>97</td>
<td>97</td>
<td>88.2%</td>
</tr>
<tr>
<td>Total:</td>
<td>600</td>
<td>565</td>
<td>721</td>
<td>94.2%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Cypress Glen Retirement Community

Address: 100 Hickory Street
City: Greenville
State: NC
Zip Code: 27858-1674
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

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$20,529</td>
<td>$292,950</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,936</td>
<td>$4,631</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>199</td>
<td>191</td>
<td>242</td>
<td>96.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>42</td>
<td>39</td>
<td>39</td>
<td>92.9%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>30</td>
<td>25</td>
<td>25</td>
<td>83.3%</td>
</tr>
<tr>
<td>Total:</td>
<td>271</td>
<td>255</td>
<td>306</td>
<td>94.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
Deerfield Episcopal Retirement Community

Address: 1617 Hendersonville Road
City: Asheville
State: NC
Zip Code: 28803-3454
Phone Number: (828) 274-1531
Fax Number: (828) 274-0238
Toll Free Number: (800) 284-1531
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 life care community, with 96 cottages, 16 villas, 13 cluster homes and 253 apartments. A state-of-the-art health care facility is licensed for 62 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 host of other amenities.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$208,959</td>
<td>$1,175,303</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,859</td>
<td>$4,865</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:

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

Entrance Fee Refund Options:

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

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>378</td>
<td>367</td>
<td>556</td>
<td>97.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>62</td>
<td>58</td>
<td>58</td>
<td>93.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>62</td>
<td>58</td>
<td>58</td>
<td>93.5%</td>
</tr>
<tr>
<td>Total:</td>
<td>502</td>
<td>483</td>
<td>672</td>
<td>96.2%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Friends Homes, Inc.

Address: 925 New Garden Road
City: Greensboro
State: NC
Zip Code: 27410-3267
Phone Number: (336) 369-4313
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

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$26,000</td>
<td>$372,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,605</td>
<td>$4,841</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>360</td>
<td>345</td>
<td>436</td>
<td>95.8%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>100</td>
<td>76</td>
<td>76</td>
<td>76.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>109</td>
<td>106</td>
<td>106</td>
<td>97.2%</td>
</tr>
<tr>
<td>Total:</td>
<td>569</td>
<td>527</td>
<td>618</td>
<td>92.6%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

Self Description:

Friends Homes is located on 73 acres of land in beautiful northwest Greensboro, North Carolina. Since its inception in 1968, Friends Homes has continued to expand and innovate as it seeks to provide the best possible retirement living environment for those who wish to be part of an active, socially connected and engaged community.

Between two campuses, Friends Homes offers independent living cottages and apartments, assisted living, skilled nursing and memory care services. The apartment accommodations range from studio units to spacious two-bedroom deluxe units, all at reasonable cost. The buildings on each main campus are interconnected with an array of centrally located common spaces.

There are many community conveniences including multiple dining venues, libraries, beauty salons/barber shops, convenience stores/gift shops, woodworking shops, lounges, clinics, fitness centers, guest rooms, meeting rooms, multi-purpose rooms, an art studio and a heated indoor saltwater pool. The beautifully landscaped grounds include walking trails, a pond, rose gardens and plots for vegetable and flower gardening.

Guilford College is just across the street and shopping, banks and churches are within walking distance. Piedmont Triad International Airport is a short drive away as is downtown Greensboro and the new Steven Tanger Center for the Performing Arts. With easy access to all of these and more, a full and rich life could not be more convenient.
# Galloway Ridge at Fearrington

**Address:** 3000 Galloway Ridge  
**City:** Pittsboro  
**State:** NC  
**Zip Code:** 27312-8639  
**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

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$226,000</td>
<td>$1,509,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$3,237</td>
<td>$7,533</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.  
- All fees listed are for reference and comparison purposes only.  
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Extensive</td>
<td>□ No Refund</td>
</tr>
<tr>
<td>□ Modified</td>
<td>☑ Fully Declining Refund</td>
</tr>
<tr>
<td>□ Fee for Service</td>
<td>□ 50% Refund</td>
</tr>
<tr>
<td>□ Equity</td>
<td>□ 80% Refund</td>
</tr>
<tr>
<td>□ Rental (No Entrance Fee)</td>
<td>☑ 90% Refund</td>
</tr>
<tr>
<td>□ Assignment of Assets</td>
<td>□ Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>315</td>
<td>304</td>
<td>428</td>
<td>96.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>51</td>
<td>28</td>
<td>28</td>
<td>54.9%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>40</td>
<td>30</td>
<td>30</td>
<td>75.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>406</td>
<td>362</td>
<td>486</td>
<td>89.2%</td>
</tr>
</tbody>
</table>

### OTHER:

- ☑ Dementia Units Available  
- ☑ Direct Admission to Assisted Living  
- ☑ Direct Admission to Nursing  
- ☑ Utilities (some or all) in Monthly Fees  
- ☑ Waiting List for (some or all) Units  
- ☑ Resident(s) 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
## Givens Estates

**Address:** 2360 Sweeten Creek Road  
**City:** Asheville  
**State:** NC  
**Zip Code:** 28803-2030  
**Phone Number:** (828) 274-4800  
**Fax Number:** (828) 771-2233  
**Toll Free Number:**  
**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. Givens Estates is currently adding 80 new Friendship Parks 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 Social Brew, Market+Craft and Terrene restaurant scheduled to open in January 2021. 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 are available. 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 1993. The community's financial strength has earned it a BBB+ bond rating from Fitch.

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entrance Fees</strong></td>
<td>$40,500</td>
<td>$1,400,000</td>
</tr>
<tr>
<td><strong>Monthly Fees</strong></td>
<td>$1,504</td>
<td>$4,670</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>409</td>
<td>393</td>
<td>542</td>
<td>96.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>61</td>
<td>50</td>
<td>50</td>
<td>82.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>70</td>
<td>63</td>
<td>63</td>
<td>90.0%</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td>540</td>
<td>506</td>
<td>655</td>
<td>93.7%</td>
</tr>
</tbody>
</table>

### OTHER:

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

Address: 200 Tabernacle Road
City: Black Mountain
State: NC
Zip Code: 28711-7733
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: The Givens Estates, Inc.
Provider Tax Status: Not-For-Profit

Self Description:

With a 49-year tradition of providing a strong sense of community for its nearly 421 residents, Givens Highland Farms offers a wide variety of accommodations and a full continuum of services. It's 75-acre campus is nestled in a cove surrounded by the beautiful Western North Carolina Mountains.

Givens Highland Farms' community features 265 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$36,000</td>
<td>$767,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,139</td>
<td>$4,582</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>278</td>
<td>255</td>
<td>351</td>
<td>91.7%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>30</td>
<td>19</td>
<td>19</td>
<td>63.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>60</td>
<td>51</td>
<td>51</td>
<td>85.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>368</td>
<td>325</td>
<td>421</td>
<td>88.3%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
### Self Description:

Glenaire is an accredited, Presbyterian-sponsored continuing care retirement community (CCRC) for seniors located in Cary, N.C. Cary is a unique city that has been ranked by Money Magazine as one of the Best Small Cities in America in which to live. Cary is located in the Research Triangle Park (RTP) area of North Carolina, close to Raleigh, Durham, and Chapel Hill.

The campus is lush with the natural flora of the area and lovely natural grounds on which to stroll during the balmy weather of North Carolina. Glenaire offers a vital lifestyle for retirees. Glenaire offers a full continuum of care on the premises featuring all private accommodations in our independent living, assisted living and skilled nursing.

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$66,000</td>
<td>$404,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,512</td>
<td>$4,576</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Occupied %</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>224</td>
<td>218</td>
<td>97.3%</td>
<td>304</td>
<td>97.3%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>9</td>
<td>9</td>
<td>100.0%</td>
<td>9</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>71</td>
<td>67</td>
<td>94.4%</td>
<td>67</td>
<td>94.4%</td>
</tr>
<tr>
<td>Total:</td>
<td>304</td>
<td>294</td>
<td>96.7%</td>
<td>380</td>
<td>96.7%</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Grace Ridge Retirement Community
Morganton

Address: 500 Lenoir Road
City: Morganton
State: NC
Zip Code: 28655-2666
Phone Number: (828) 580-8300
Fax Number: (828) 580-8309
Toll Free Number: (800) 331-6941
County: Burke
Web Page: www.graceridge.com
Year Opened: 1987
Licensed Provider: Grace Life Care, 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 the Carolinas Healthcare System Blue Ridge.

Located within 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:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$54,842</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,237</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:
- Extensive  Yes  No Refund
- Modified Yes  Fully Declining Refund
- Fee for Service Yes  50% Refund
- Equity No  80% Refund
- Rental (No Entrance Fee) Yes  90% Refund
- Assignment of Assets No  Full Refund

Occupancy:

<table>
<thead>
<tr>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>145</td>
<td>118</td>
<td>152</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>47</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>25</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Total:</td>
<td>217</td>
<td>171</td>
<td>205</td>
</tr>
</tbody>
</table>

Other:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
Matthews Glen

Address: 733 Plantation Estates Drive
City: Matthews
State: NC
Zip Code: 28105-9114
Phone Number: (704) 845-5900
Fax Number: (704) 845-5443
Toll Free Number: (800) 582-4316
County: Mecklenburg
Web Page: www.acts-retirement.org
Year Opened: 1988
Licensed Provider: ACTS Retirement - Life Communities, Inc.
Provider Tax Status: Not-For-Profit

Self Description:
Matthews Glen is a not-for-profit continuing care retirement community on 50 acres with 507 independent living apartments, 60 assisted living rooms, and 80 skilled nursing beds. The community will open a new 90 bed all private room/private bath skilled care building in September 2020, and will be closing down the current 80 bed skilled care facility for future renovations. The amenities and services of the community include a full-service dining room, cafe 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. Matthews Glen has obtained approval to begin construction of 16 more villas and 72 independent living apartments, and we anticipate construction will begin in 2021.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$126,900</td>
<td>$947,900</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,100</td>
<td>$5,280</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Extensive</td>
<td>□ No Refund</td>
</tr>
<tr>
<td>✓ Modified</td>
<td>✓ Fully Declining Refund</td>
</tr>
<tr>
<td>✓ Fee for Service</td>
<td>□ 50% Refund</td>
</tr>
<tr>
<td>✓ Equity</td>
<td>□ 80% Refund</td>
</tr>
<tr>
<td>✓ Rental (No Entrance Fee)</td>
<td>□ 90% Refund</td>
</tr>
<tr>
<td>✓ Assignment of Assets</td>
<td>□ Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>507</td>
<td>483</td>
<td>657</td>
<td>95.3%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>60</td>
<td>57</td>
<td>57</td>
<td>95.0%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>80</td>
<td>75</td>
<td>75</td>
<td>93.8%</td>
</tr>
<tr>
<td>Total</td>
<td>647</td>
<td>615</td>
<td>789</td>
<td>95.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Oak Creek Apartments

Address: 343 Baldwin Road
          P.O. Box 3426
City: Burlington
State: NC
Zip Code: 27217-3426
Phone Number: (336) 226-5739
Fax Number: (336) 229-2333
Toll Free Number: Alamance
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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$30,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,125</td>
<td>$2,075</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>54</td>
<td>49</td>
<td>57</td>
<td>90.7%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>160</td>
<td>120</td>
<td>120</td>
<td>75.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>214</td>
<td>169</td>
<td>177</td>
<td>79.0%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Penick Village provides a quality of life which blends personal freedom and security, 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: “We have an uncompromising commitment to deinstitutionalize the aging experience.”
Pennybyrn at Maryfield

Address: 109 Penny Road
City: High Point
State: NC
Zip Code: 27260-2611
Phone Number: (336) 821-4000
Fax Number: (336) 886-7197
Toll Free Number:
County: Guilford
Web Page: www.pennybyrnatmaryfield.com
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. Seventy-three 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 residences, 131 independent living apartments and 125 skilled nursing beds. Attached to the apartment building is a community center and wellness center that offer a wide range on 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 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$80,000</td>
<td>$471,500</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,285</td>
<td>$5,148</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Extensive</td>
<td>□ No Refund</td>
</tr>
<tr>
<td>□ Modified</td>
<td>✔ Fully Declining Refund</td>
</tr>
<tr>
<td>□ Fee for Service</td>
<td>□ 50% Refund</td>
</tr>
<tr>
<td>□ Equity</td>
<td>□ 80% Refund</td>
</tr>
<tr>
<td>□ Rental (No Entrance Fee)</td>
<td>✔ 90% Refund</td>
</tr>
<tr>
<td>□ Assignment of Assets</td>
<td>□ Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>180</td>
<td>178</td>
<td>237</td>
<td>98.9%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>36</td>
<td>30</td>
<td>30</td>
<td>83.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>125</td>
<td>110</td>
<td>112</td>
<td>88.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>341</td>
<td>318</td>
<td>379</td>
<td>93.3%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
**Self Description:**

Located in the Piedmont Triad area of North Carolina, Piedmont Crossing has been a popular choice for retirement living for over 30 years. A program of United Church Homes and Services (UCHS), Piedmont Crossing is situated on a beautiful 60-acre campus, and is 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 cottages, villas, apartments, and patio homes. The Campus offers a fee-for-service approach to community living where residents make their own selection of services, tailored to make living easy and enjoyable. Residents are free to join in life’s adventures without the responsibility of home maintenance, and can relax in the comfort of knowing that additional supportive services are available if needed. A primary hope for many seniors is to live independently; Our licensed home care program customizes care and services to meet the client’s individual 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 household responsibilities of 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 personalized to serve the acuity needs of each individual. We value a person-centered approach to care in a family-friendly atmosphere. Our Health Center includes short-term or transitional rehabilitation, memory support, and long-term care. Led by a team of dedicated professionals, we provide a comprehensive approach to healthcare.

Piedmont Crossing embraces life while furthering its mission: A Christian ministry providing vibrant living, diverse programs of outreach and compassionate services.
Pisgah Valley Retirement Community

Address: 104 Holcombe Cove Road
City: Candler
State: NC
Zip Code: 28715-9450
Phone Number: (828) 418-2333
Fax Number: 
Toll Free Number: 
County: Buncombe
Web Page: www.pisgahvalleyretirement.com
Year Opened: 1975
Licensed Provider: Pisgah Valley Retirement Center, LLC and Pisgah Valley Retirement Center Properties, LLC.
Provider Tax Status: For-Profit

Self Description:

Pisgah Valley Retirement Community is located in Candler, NC nestled in the Smokey Mountains of Western North Carolina just 10 minutes from downtown Asheville and only minutes from the Blue Ridge Parkway and the Smokey Mountain National Park.

Established in 1975 as a not-for-profit skilled nursing facility, Pisgah Valley Retirement Community became a licensed Continuing Care Retirement Community in 2007 and in 2018 was acquired by the Liberty Healthcare Group located in Wilmington, NC.

Our 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, and skilled nursing. We also have a wellness center where our residents can enjoy a pool, sauna, whirlpool, and cardio/strength training equipment.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$173,670</td>
<td>$314,475</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,575</td>
<td>$1,575</td>
</tr>
</tbody>
</table>

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Refund</td>
</tr>
<tr>
<td>Extensive</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>Full Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td></td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>72</td>
<td>69</td>
<td>88</td>
<td>95.8%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>24</td>
<td>20</td>
<td>20</td>
<td>83.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>118</td>
<td>106</td>
<td>106</td>
<td>89.8%</td>
</tr>
<tr>
<td>Total:</td>
<td>214</td>
<td>195</td>
<td>214</td>
<td>91.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Pittsboro Christian Village

Address: 1825 East Street
City: Pittsboro
State: NC
Zip Code: 27312-8842
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 approximately 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 or 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$30,000</td>
<td>$155,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,375</td>
<td>$2,185</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Extensive</td>
<td>☑ No Refund</td>
</tr>
<tr>
<td>☐ Modified</td>
<td>☑ Fully Declining Refund</td>
</tr>
<tr>
<td>☐ Fee for Service</td>
<td>☐ 50% Refund</td>
</tr>
<tr>
<td>☐ Equity</td>
<td>☐ 80% Refund</td>
</tr>
<tr>
<td>☐ Rental (No Entrance Fee)</td>
<td>☐ 90% Refund</td>
</tr>
<tr>
<td>☐ Assignment of Assets</td>
<td>☑ Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>68</td>
<td>65</td>
<td>87</td>
<td>95.6%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>40</td>
<td>21</td>
<td>21</td>
<td>52.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Total:</td>
<td>108</td>
<td>86</td>
<td>108</td>
<td>79.6%</td>
</tr>
</tbody>
</table>

OTHER:

- ☐ Dementia Units Available
- ☐ Direct Admission to Assisted Living
- ☐ Direct Admission to Nursing
- ☐ Utilities (some or all) in Monthly Fees
- ☐ Waiting List for (some or all) Units
- ☐ Resident(s) 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

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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.
**Plantation Village**

**Address:** 1200 Porters Neck Road

**City:** Wilmington

**State:** NC

**Zip Code:** 28411-7622

**Phone Number:** (910) 686-7181

**Fax Number:** (910) 686-4773

**Toll Free Number:** (800) 334-0035

**County:** New Hanover

**Web Page:** www.plantationvillagerc.com

**Year Opened:** 1988

**Licensed Provider:** Plantation Village, Inc.

**Provider Tax Status:** Not-For-Profit

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entrance Fees</strong></td>
<td>$83,121</td>
<td>$443,518</td>
</tr>
<tr>
<td><strong>Monthly Fees</strong></td>
<td>$2,649</td>
<td>$5,227</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>248</td>
<td>233</td>
<td>304</td>
<td>94.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Total:</td>
<td>248</td>
<td>233</td>
<td>304</td>
<td>94.0%</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

Note:
- Fees listed have been provided by the community.
- Fees listed are for reference and comparison purposes only.
- 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.

**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.
Quail Haven Village

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: quailhavenvillage.com
Year Opened: 1986
 Licensed Provider: Quail Haven of Pinehurst, LLC

Self Description:
Quail Haven Village, established in 1986, located in Pinehurst, NC with its world-renowned golf facilities and landscape was acquired in 2013 by the Liberty Healthcare Group located in 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 and barber shop, 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 for family, friends, and their favorite activities. Residents enjoy the beautiful, restaurant-style dining room. Residents feel “at home” in the friendly, supportive environment of Quail Haven Village.

Fees:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,826</td>
<td>$4,865</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

Occupancy:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>80</td>
<td>58</td>
<td>79</td>
<td>72.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>60</td>
<td>19</td>
<td>52</td>
<td>31.7%</td>
</tr>
<tr>
<td>Total:</td>
<td>140</td>
<td>77</td>
<td>131</td>
<td>55.0%</td>
</tr>
</tbody>
</table>

Other:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
River Landing at Sandy Ridge

**Address:** 1575 John Knox Drive

**City:** Colfax  
**State:** NC  
**Zip Code:** 27235-9662

**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 222 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 and indoor track.
- Planned social, recreational, educational, cultural, and spiritual activities.
- Private apartments in assisted living and private rooms in our 5-star, Medicare-certified Skilled 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, 5 restaurants, a clubhouse, a coffee & creamery shop, 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 residences 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 the resident's health and wellness. River Landing's enLighten program is 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:**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$128,000</td>
<td>$426,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$3,020</td>
<td>$4,578</td>
</tr>
</tbody>
</table>

**Note:**

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:**

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

**OCCUPANCY:**

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>298</td>
<td>281</td>
<td>418</td>
<td>94.3%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>56</td>
<td>55</td>
<td>55</td>
<td>98.2%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>60</td>
<td>56</td>
<td>56</td>
<td>93.3%</td>
</tr>
<tr>
<td>Total:</td>
<td>414</td>
<td>392</td>
<td>529</td>
<td>94.7%</td>
</tr>
</tbody>
</table>

**OTHER:**

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Salemtowne

Address: 1000 Salemtowne Drive
City: Winston-Salem
State: NC
Zip Code: 27106-3294
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, Incorporated (d/b/a Salemtowne)
Provider Tax Status: Not-For-Profit

Self Description:
Salemtowne is a non-profit, continuing care retirement community affiliated with the Moravian Church located in Winston-Salem, NC near Historic Bethabara. Established in 1972, Salemtowne is an ecumenical community that has a beautiful 120+ acre campus with lots of green space and over 450 residents. The minimum age for entry is 62 except in a two-applicant household where one member can be younger. Accommodations for independent living include cottages clustered in three distinct neighborhoods with recognizable Moravian architecture and apartments in two different buildings. Salemtowne has a new 100-bed skilled nursing center using the household model of care that was completed in 2017. Also featured is a comprehensive multi-disciplinary transitional rehabilitation center that specializes in short-stay recovery after surgery or illness. This building also houses a 20-bed assisted living memory support household as well. Finally, Salemtowne has an assisted living center that features studio and one-bedroom suites.

Community amenities include a fitness center with indoor pool and exercise rooms featuring an array of programs to benefit beginner or advanced fitness levels. Salemtowne also has multiple dining venues, salons, libraries, gift shops, art studio, a woodworking shop, hiking trails, a community garden, and a four-acre lake.

Salemtowne also operates a continuing care at-home program, Navigation by Salemtowne.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$70,000</td>
<td>$417,400</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,055</td>
<td>$4,986</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>196</td>
<td>173</td>
<td>241</td>
<td>88.3%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>66</td>
<td>32</td>
<td>32</td>
<td>48.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>100</td>
<td>79</td>
<td>79</td>
<td>79.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>362</td>
<td>284</td>
<td>352</td>
<td>78.5%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Scotia Village

Address: 2200 Elm Avenue
City: Laurinburg
State: NC
Zip Code: 28352-8035
Phone Number: (910) 277-2000
Fax Number: (910) 277-2025
Toll Free Number: (888) 726-8428
County: Scotland
Web Page: www.scotiavillage.org
Year Opened: 1988
Licensed Provider: The Presbyterian Homes, Inc.
Provider Tax Status: Not-For-Profit

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$42,000</td>
<td>$311,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,318</td>
<td>$3,565</td>
</tr>
</tbody>
</table>

Note:

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>126</td>
<td>118</td>
<td>161</td>
<td>93.7%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>32</td>
<td>28</td>
<td>28</td>
<td>87.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>58</td>
<td>52</td>
<td>52</td>
<td>89.7%</td>
</tr>
<tr>
<td>Total:</td>
<td>216</td>
<td>198</td>
<td>241</td>
<td>91.7%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

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. Laurinburg was also named a "Certified Retirement Community" in 2016.

A variety of lifelong learning opportunities to include the enLighten program that features various courses from all over the world that are interactively taught on the Scotia Village campus. - 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 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.

Note:

- All fees listed are for reference and comparison purposes only.
- 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:

- Extensive
- Modified
- Fee for Service
- Equity
- Rental (No Entrance Fee)
- Assignment of Assets
- Medicaid Certified
- Medicare Certified
- Pets (some) Allowed
- Emergency Call System
- Swimming Pool/Spa/Sauna
- Transportation Available
- Exercise Room or Programs
- Undergoing Expansion
**Searstone**

**Address:** 17001 Searstone Drive

**City:** Cary

**State:** NC

**Zip Code:** 27513-9978

**Phone Number:** (919) 234-0400

**Fax Number:** (919) 466-8988

**Toll Free Number:** Wake

**County:** Wake

**Web Page:** www.searstone.com

**Year Opened:** 2013

**Licensed Provider:** Samaritan Housing Foundation Inc. d/b/a Searstone Retirement Community

**Provider Tax Status:** Not-For-Profit

---

**Self Description:**

Searstone is built on 75-acres of former family farmland 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 does not 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 to 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:**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$371,000</td>
<td>$866,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$3,270</td>
<td>$7,330</td>
</tr>
</tbody>
</table>

**Note:**

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:**

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

---

**OCCUPANCY:**

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>169</td>
<td>166</td>
<td>245</td>
<td>98.2%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>14</td>
<td>12</td>
<td>12</td>
<td>85.7%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>25</td>
<td>13</td>
<td>13</td>
<td>52.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>208</td>
<td>191</td>
<td>270</td>
<td>91.8%</td>
</tr>
</tbody>
</table>

---

**OTHER:**

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Sharon Towers

Address: 5100 Sharon Road
City: Charlotte
State: NC
Zip Code: 28210-4768
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 Home 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 and two 18-Unit Villas 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:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$35,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,603</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Extensive</td>
<td>□ No Refund</td>
</tr>
<tr>
<td>✓ Modified</td>
<td>✓ Fully Declining Refund</td>
</tr>
<tr>
<td>□ Fee for Service</td>
<td>✓ 50% Refund</td>
</tr>
<tr>
<td>□ Equity</td>
<td>✓ 80% Refund</td>
</tr>
<tr>
<td>□ Rental (No Entrance Fee)</td>
<td>□ 90% Refund</td>
</tr>
<tr>
<td>□ Assignment of Assets</td>
<td>□ Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>229</td>
<td>202</td>
<td>243</td>
<td>88.2%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>40</td>
<td>32</td>
<td>32</td>
<td>80.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>96</td>
<td>60</td>
<td>60</td>
<td>62.5%</td>
</tr>
<tr>
<td>Total:</td>
<td>365</td>
<td>294</td>
<td>335</td>
<td>80.5%</td>
</tr>
</tbody>
</table>

OTHER:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Dementia Units Available</td>
<td>□ Medicaid Certified</td>
</tr>
<tr>
<td>✓ Direct Admission to Assisted Living</td>
<td>✓ Medicare Certified</td>
</tr>
<tr>
<td>✓ Direct Admission to Nursing</td>
<td>✓ Pets (some) Allowed</td>
</tr>
<tr>
<td>✓ Utilities (some or all) in Monthly Fees</td>
<td>✓ Emergency Call System</td>
</tr>
<tr>
<td>✓ Waiting List for (some or all) Units</td>
<td>✓ Swimming Pool/Spa/Sauna</td>
</tr>
<tr>
<td>✓ Resident(s) on the Board of Directors</td>
<td>✓ Transportation Available</td>
</tr>
<tr>
<td>✓ Housekeeping (some or all) in Monthly Fees</td>
<td>✓ Exercise Room or Programs</td>
</tr>
<tr>
<td>✓ Meals (some or all) in Monthly Fees</td>
<td>✓ Undergoing Expansion</td>
</tr>
</tbody>
</table>
Sharon Village Apartments

Address: 4009 Craig Avenue
P.O. Box 220130
City: Charlotte
State: NC
Zip Code: 28211-2505
Phone Number: (704) 365-2620
Fax Number: (704) 365-2624
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 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$17,000</td>
<td>$30,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,135</td>
<td>$2,385</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>34</td>
<td>32</td>
<td>32</td>
<td>94.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>180</td>
<td>143</td>
<td>143</td>
<td>79.4%</td>
</tr>
<tr>
<td>Total:</td>
<td>214</td>
<td>175</td>
<td>175</td>
<td>81.8%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
Southminster

Address: 8919 Park Road
City: Charlotte
State: NC
Zip Code: 28210-7629
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:
A leader in the field of aging, Southminster is a non-profit, charitable, life plan community, providing innovative living solutions across a continuum of care. Dedicated to overall well-being, Southminster embraces living life with purpose by valuing independence and privacy, inspiring creative passions, encouraging lifelong learning, and motivating each individual’s plan for wellness to its highest potential. Conveniently located in “South Charlotte,” Southminster enjoys 27 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. Other amenities include an art studio & gallery, an arts & crafts studio, a woodworking shop, hair salon, library, pharmacy, guest rooms, a modern wellness center with heated indoor pool, exercise gym, and aerobics workout studio. Throughout Southminster are inviting living spaces with welcoming fireplaces perfect for socializing with friends and smaller private rooms for playing cards and games and meeting rooms for large and small gatherings. Residents have the option of dining formally in the upscale Promenade Room, more casually in The Oak Leaf Grille, or a private dining room. Our fully licensed pub is available prior to or following dinner.

With a 33-year heritage, Southminster is committed to providing the highest quality service and care to meet your needs. Care can also be delivered in the comfort of your home through our fully licensed home care agency, Embrace Care. Should you need a higher level of assisted, memory, or skilled care, Embrace Health makes your transition seamless and comfortable. In 2020 Southminster completed an expansion adding villa style apartments called Southminster Terraces. These spacious apartments offer open, transitional floor plans, high ceilings, multiple sides of light exposure, and all the modern conveniences found in today’s new homes. Southminster has also completed construction of a new, state-of-the art health center. Embracing the neighborhood model of care, this 200,000 sq. ft. facility will be home to those needing assisted living and skilled nursing care and will allow residents to enjoy large open living spaces, activity areas, a landscaped courtyard, and new dining venues.

FEES:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$47,400</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,916</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>279</td>
<td>259</td>
<td>340</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>25</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>60</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Total:</td>
<td>364</td>
<td>322</td>
<td>403</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
- Swimming Pool/Spa/Sauna
- Transportation Available
- Exercise Room or Programs
- Undergoing Expansion
Springmoor Life Care Retirement Community

Address: 1500 Sawmill Road
City: Raleigh
State: NC
Zip Code: 27615-4320
Phone Number: (919) 848-7000
Fax Number: (919) 848-7392
Toll Free Number: Wake
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 on site 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, psychiatric and podiatry care. The standard for care assures that the resident receives 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 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:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$98,000</td>
</tr>
<tr>
<td></td>
<td>$425,100</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,679</td>
</tr>
<tr>
<td></td>
<td>$5,489</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:
- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

OCCUPANCY:

<table>
<thead>
<tr>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Occupied Residents</th>
<th>Occupied Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>388</td>
<td>364</td>
<td>473</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>18</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>173</td>
<td>92</td>
<td>92</td>
</tr>
<tr>
<td>Total:</td>
<td>579</td>
<td>473</td>
<td>582</td>
</tr>
</tbody>
</table>

OTHER:
- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Stanley Total Living Center

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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$32,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,237</td>
<td>$3,724</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>28</td>
<td>23</td>
<td>30</td>
<td>82.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>40</td>
<td>34</td>
<td>34</td>
<td>85.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>106</td>
<td>95</td>
<td>95</td>
<td>89.6%</td>
</tr>
<tr>
<td>Total:</td>
<td>174</td>
<td>152</td>
<td>159</td>
<td>87.4%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
The Barclay at SouthPark received a conditional, permanent license in August, 2020. The facility is scheduled to be fully operational in January, 2021.

The Barclay at SouthPark is located in a mixed-use development that includes a variety of residential choices, shops, and restaurants. It is situated within a larger medical park development. The Barclay at SouthPark is scheduled to open in late 2020. It is owned and operated by a joint venture between the Liberty Healthcare Group located in Wilmington, NC and a capital marketing company.

The Barclay at SouthPark offers 165 elegant senior living one- and two-bedroom rental apartments, high-end amenity spaces, an engaging lifestyle and a continuum of care if needed. An emphasis on whole-person wellness, distinctive dining, high-end amenity areas and services all provide for the lifestyle our residents have earned and deserve.

Self Description:

The Barclay at SouthPark received a conditional, permanent license in August, 2020. The facility is scheduled to be fully operational in January, 2021.

The Barclay at SouthPark is located in a mixed-use development that includes a variety of residential choices, shops, and restaurants. It is situated within a larger medical park development. The Barclay at SouthPark is scheduled to open in late 2020. It is owned and operated by a joint venture between the Liberty Healthcare Group located in Wilmington, NC and a capital marketing company.

The Barclay at SouthPark offers 165 elegant senior living one- and two-bedroom rental apartments, high-end amenity spaces, an engaging lifestyle and a continuum of care if needed. An emphasis on whole-person wellness, distinctive dining, high-end amenity areas and services all provide for the lifestyle our residents have earned and deserve.

CONTRACT AND REFUND OPTIONS:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>165</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>108</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>22</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Total</td>
<td>295</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

OTHER:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dementia Units Available</td>
<td>Medicaid Certified</td>
</tr>
<tr>
<td>Direct Admission to Assisted Living</td>
<td>Medicare Certified</td>
</tr>
<tr>
<td>Direct Admission to Nursing</td>
<td>Pets (some) Allowed</td>
</tr>
<tr>
<td>Utilities (some or all) in Monthly Fees</td>
<td>Emergency Call System</td>
</tr>
<tr>
<td>Waiting List for (some or all) Units</td>
<td>Swimming Pool/Spa/Sauna</td>
</tr>
<tr>
<td>Resident(s) on the Board of Directors</td>
<td>Transportation Available</td>
</tr>
<tr>
<td>Housekeeping (some or all) in Monthly Fees</td>
<td>Exercise Room or Programs</td>
</tr>
<tr>
<td>Meals (some or all) in Monthly Fees</td>
<td>Undergoing Expansion</td>
</tr>
</tbody>
</table>
The Cardinal at North Hills is located in the vibrant North Hills Midtown District. This new full continuum senior living community is steps away from a variety of restaurants, shopping, and entertainment options. The Cardinal at North Hills offers a full continuum of senior lifestyle options from spacious, well appointed independent living residences to assisted living, and memory care or nursing care. This full continuum of options ensures that if residents’ needs change, they can remain in place in the community they love. Within the overall 6-acre community, The Cardinal includes four living options: 165 Independent Living apartment homes; 27 Assisted Living apartment homes where supportive care is provided for residents who require assistance with activities of daily living; a ground level household with 18 residences designed specifically for specialized assisted living for Alzheimer’s and related cognitive challenges where residents live in a safe, secured neighborhood area and receive special care; and 15 Medicare certified private nursing units. The first two levels that include nursing care and memory care are organized as households. These warm, comfortable household settings promote independence and dignity and reduce anxiety.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$11,000</td>
<td>$21,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$5,500</td>
<td>$10,500</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>165</td>
<td>164</td>
<td>223</td>
<td>99.4%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>55</td>
<td>42</td>
<td>44</td>
<td>76.4%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>100.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>235</td>
<td>221</td>
<td>282</td>
<td>94.0%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
## The Cedars of Chapel Hill

**Address:** 100 Cedar Club Circle  
**City:** Chapel Hill  
**State:** NC  
**Zip Code:** 27517  
**Phone Number:** (919) 259-7000  
**Fax Number:** (919) 259-7001  
**Toll Free Number:** (877) 433-3667  
**County:** Durham  
**Web Page:** www.cedarsofchapelhill.com  
**Year Opened:** 2004  
**Licensed Provider:** The Cedars of Chapel Hill, L.L.C. / The Cedars 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:

**Entrance Fees**

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3,072</td>
<td>$6,782</td>
</tr>
</tbody>
</table>

**Monthly Fees**

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### Occupancy:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>306</td>
<td>305</td>
<td>399</td>
<td>99.7%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>74</td>
<td>52</td>
<td>52</td>
<td>70.3%</td>
</tr>
<tr>
<td>Total:</td>
<td>384</td>
<td>361</td>
<td>455</td>
<td>94.0%</td>
</tr>
</tbody>
</table>

### Other:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
The Cypress of Charlotte

Address: 3442 Cypress Club Drive
City: Charlotte
State: NC
Zip Code: 28210-2467
Phone Number: (704) 714-5500
Fax Number: (704) 714-5501
Toll Free Number: (800) 643-1665
County: Mecklenburg
Web Page: www.thecypressofcharlotte.com
Year Opened: 1999
Licensed Provider: The Cypress of Charlotte, LLC
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 3,800 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:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td></td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,742</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:  
- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living</td>
<td>304</td>
<td>307</td>
<td>420</td>
<td>101.0%</td>
</tr>
<tr>
<td>Assisted Living</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>56</td>
<td>50</td>
<td>50</td>
<td>89.3%</td>
</tr>
<tr>
<td>Total</td>
<td>364</td>
<td>361</td>
<td>474</td>
<td>99.2%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
**The Cypress of Raleigh**

**Address:** 8801 Cypress Lakes Drive  
**City:** Raleigh  
**State:** NC  
**Zip Code:** 27615-2118  
**Phone Number:** (919) 870-9007  
**Fax Number:** (919) 518-8971  
**Toll Free Number:** (888) 876-9007  
**County:** Wake  
**Web Page:** www.cypressofraleigh.com  
**Year Opened:** 2008  
**Licensed Provider:** The Cypress of Raleigh, LLC  
**Provider Tax Status:** 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, 5 mid-rise luxury condominium villa buildings, 37 free standing cottages. Square footages range from 813 sq. ft. to 3,900 sq. ft. In addition, there is a 61-bed Health Center with skilled nursing facility, assisted living beds, and memory care beds.

**FEES:**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,582</td>
<td>$4,737</td>
</tr>
</tbody>
</table>

**Note:**  
- Fees listed have been provided by the community.  
- All fees listed are for reference and comparison purposes only.  
- 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:**

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

**OCCUPANCY:**

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>262</td>
<td>262</td>
<td>367</td>
<td>100.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>36</td>
<td>33</td>
<td>37</td>
<td>91.7%</td>
</tr>
<tr>
<td>Total:</td>
<td>302</td>
<td>299</td>
<td>408</td>
<td>99.0%</td>
</tr>
</tbody>
</table>

**OTHER:**

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

Address: 2701 Pickett Road
City: Durham
State: NC
Zip Code: 27705-5688
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 Forest at Duke, Inc.

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 25 years. From its center 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, club room with pool tables, an auditorium, bank, hair salon, arts studio, and other village amenities. Residents enjoy an indoor pool and fitness center with full time staff, greenhouse, and gardening plots. 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.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$97,970</td>
<td>$566,205</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$3,332</td>
<td>$6,115</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Occupied</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>249</td>
<td>235</td>
<td>316</td>
<td>94.4%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>34</td>
<td>29</td>
<td>29</td>
<td>85.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>58</td>
<td>50</td>
<td>50</td>
<td>86.2%</td>
</tr>
<tr>
<td>Total:</td>
<td>341</td>
<td>314</td>
<td>395</td>
<td>92.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
The Gardens of Taylor Glen

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, Incorporated
Provider Tax Status: Not-For-Profit

Self Description:
The Gardens of Taylor Glen is a flourishing life plan community owned and operated by Baptist Retirement Homes (BRH), a not-for-profit organization committed to providing quality care and a meaningful way of life for residents and staff since 1951. Located on 100 acres of wooded, rolling hills in the delightful city of Concord, this community is a place where residents and staff become an extension of family that recognizes the dignity and worth of each individual. As part of a strong 70-year legacy to enrich senior living in North Carolina with a first-rate level of service, dignity, and kindness, we invite you to discover why The Gardens of Taylor Glen is a retirement gem.

Our community conveniently located near Charlotte, NC, is a place where residents are invited to embrace an active retirement lifestyle by taking advantage of a wide variety of campus and community activities. A robust calendar provides plenty of options to enjoy some fun at whatever best suits lifestyle needs. We have a pool and fitness area as well as regularly scheduled classes and activities. All our assisted living and healthcare apartments are private.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$44,000</td>
<td>$169,901</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,044</td>
<td>$4,721</td>
</tr>
</tbody>
</table>

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

CONTRACT AND REFUND OPTIONS:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living</td>
<td>125</td>
<td>95</td>
<td>121</td>
<td>76.0%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>24</td>
<td>19</td>
<td>19</td>
<td>79.2%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>24</td>
<td>12</td>
<td>12</td>
<td>50.0%</td>
</tr>
<tr>
<td>Total</td>
<td>173</td>
<td>126</td>
<td>152</td>
<td>72.8%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
The Oaks at Whitaker Glen

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 one- and two-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 theater, 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$58,000</td>
<td>$160,250</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$3,031</td>
<td>$3,985</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Extensive</td>
<td>□ No Refund</td>
</tr>
<tr>
<td>□ Modified</td>
<td>✓ Fully Declining Refund</td>
</tr>
<tr>
<td>✓ Fee for Service</td>
<td>✓ 50% Refund</td>
</tr>
<tr>
<td>□ Equity</td>
<td>□ 80% Refund</td>
</tr>
<tr>
<td>□ Rental (No Entrance Fee)</td>
<td>□ 90% Refund</td>
</tr>
<tr>
<td>□ Assignment of Assets</td>
<td>□ Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>96</td>
<td>76</td>
<td>87</td>
<td>79.2%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>139</td>
<td>105</td>
<td>105</td>
<td>75.5%</td>
</tr>
<tr>
<td>Total</td>
<td>235</td>
<td>181</td>
<td>192</td>
<td>77.0%</td>
</tr>
</tbody>
</table>

### OTHER:

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

Note:
- Fees listed have been provided by the community.
- Fees listed are for reference and comparison purposes only.
- 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.
The Pines at Davidson is located on a 144-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 venue, library, arts and crafts room, multi-purpose room, TV and game room, coffee and ice cream kiosk, pub, café, formal living room, billiards room, beauty/barber shop, post office and chapel. Also available on campus are a woodworking shop, 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:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$47,800</td>
<td>$524,130</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,631</td>
<td>$7,595</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>250</td>
<td>243</td>
<td>309</td>
<td>97.2%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>30</td>
<td>27</td>
<td>27</td>
<td>90.0%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>51</td>
<td>49</td>
<td>49</td>
<td>96.1%</td>
</tr>
<tr>
<td>Total</td>
<td>331</td>
<td>319</td>
<td>385</td>
<td>96.4%</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
**The Templeton of Cary**

**Address:** 215 Brightmore Drive

**City:** Cary  
**State:** NC  
**Zip Code:** 27511-  
**Phone Number:** (984) 200-3688  
**Fax Number:**  
**Toll Free Number:**  
**County:** Wake  
**Web Page:** https://www.thetempletonofcary.com/?gclid  
**Year Opened:** 2020  
**Licensed Provider:** Cary Senior Housing I OPCO, LLC  
**Provider Tax Status:** For-Profit

---

**Self Description:**

The Templeton of Cary is located in a mixed-use development that includes a variety of residential choices, shops, and restaurants. It is situated within a larger medical park development. The Templeton of Cary’s independent living units opened in June 2020 and its healthcare center in July 2020. It is owned and operated by a joint venture between the Liberty Healthcare Group located in Wilmington, NC, and a capital marketing company.

The Templeton of Cary offers 199 elegant senior living - one-and two-bedroom apartments, high-end amenity spaces, an engaging lifestyle and a continuum of care if needed. An emphasis on whole-person wellness, distinctive dining, high-end amenity areas and services all provide for the lifestyle our residents have earned and deserve.

---

**FEES:**

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$4,760</td>
<td>$7,300</td>
</tr>
</tbody>
</table>

**Note:**

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:**

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

---

**OCCUPANCY:**

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>199</td>
<td>32</td>
<td>41</td>
<td>16.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>92</td>
<td>6</td>
<td>6</td>
<td>6.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>28</td>
<td>7</td>
<td>7</td>
<td>25.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>319</td>
<td>45</td>
<td>54</td>
<td>14.1%</td>
</tr>
</tbody>
</table>

---

**OTHER:**

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
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 Burlington and Brookwood community.

The Village at Brookwood offers 5 different apartment plans and 4 distinct garden home plans. Garden homes are free standing and have attached carports or garages. All apartments have balconies and are connected to the Village Center by climate-controlled pathways.

Originally sponsored by Alamance Regional Medical Center, The Village became part of Cone Health in 2013. This relationship ensures residents’ access to the latest medical advances, preventative medicine, and seamless transitions from Cone Health back home or The Village’s healthcare for recuperation.

“Your’re among friends at The Village at Brookwood.”

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$96,300</td>
<td>$323,500</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,271</td>
<td>$4,448</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Extensive</td>
<td>☐ No Refund</td>
</tr>
<tr>
<td>☐ Modified</td>
<td>☑ Fully Declining Refund</td>
</tr>
<tr>
<td>☑ Fee for Service</td>
<td>☑ 50% Refund</td>
</tr>
<tr>
<td>☐ Equity</td>
<td>☐ 80% Refund</td>
</tr>
<tr>
<td>☐ Rental (No Entrance Fee)</td>
<td>☑ 90% Refund</td>
</tr>
<tr>
<td>☐ Assignment of Assets</td>
<td>☐ Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>155</td>
<td>151</td>
<td>207</td>
<td>97.4%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>24</td>
<td>19</td>
<td>19</td>
<td>79.2%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>105</td>
<td>87</td>
<td>87</td>
<td>82.9%</td>
</tr>
<tr>
<td>Total:</td>
<td>284</td>
<td>257</td>
<td>313</td>
<td>90.5%</td>
</tr>
</tbody>
</table>

OTHER:

☑ Dementia Units Available
☑ Direct Admission to Assisted Living
☑ Direct Admission to Nursing
☑ Utilities (some or all) in Monthly Fees
☑ Waiting List for (some or all) Units
☑ Resident(s) 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
Trinity Oaks

Address: 728 Klumac Road
City: Salisbury
State: NC
Zip Code: 28144-5714
Phone Number: (704) 633-1002
Fax Number: (704) 636-5038
Toll Free Number: (800) 610-0783
County: Rowan
Web Page: www.trinitoaks.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. 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 makes Trinity Oaks the right choice for retirement living in Piedmont North Carolina.

Fees:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$58,350</td>
<td>$405,794</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,982</td>
<td>$3,425</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

Occupancy:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>179</td>
<td>170</td>
<td>217</td>
<td>95.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>115</td>
<td>100</td>
<td>100</td>
<td>87.0%</td>
</tr>
<tr>
<td>Total:</td>
<td>344</td>
<td>320</td>
<td>367</td>
<td>93.0%</td>
</tr>
</tbody>
</table>

Other:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Tryon Estates

Address: 617 Laurel Lake Drive
City: Columbus
State: NC
Zip Code: 28722-7420
Phone Number: (828) 894-3000
Fax Number: (828) 894-2959
Toll Free Number: (800) 633-2718
County: Polk
Web Page: www.actsrretirement.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 community contains 274 independent living apartments, ranging in size from one to three bedrooms, and 10 independent living villas. 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 accredited by CARF-CCAC.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$145,900</td>
<td>$707,900</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,342</td>
<td>$3,963</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>286</td>
<td>256</td>
<td>375</td>
<td>89.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>44</td>
<td>35</td>
<td>35</td>
<td>79.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>52</td>
<td>38</td>
<td>38</td>
<td>73.1%</td>
</tr>
<tr>
<td>Total:</td>
<td>382</td>
<td>329</td>
<td>448</td>
<td>86.1%</td>
</tr>
</tbody>
</table>

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
**Twin Lakes Community**

**Address:** 3701 Wade Coble Drive

**City:** Burlington

**State:** NC

**Zip Code:** 27215-9756

**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

### FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$55,000</td>
<td>$415,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$1,590</td>
<td>$3,023</td>
</tr>
</tbody>
</table>

**Note:**
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>406</td>
<td>384</td>
<td>545</td>
<td>94.6%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>20</td>
<td>16</td>
<td>16</td>
<td>80.0%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>116</td>
<td>107</td>
<td>107</td>
<td>92.2%</td>
</tr>
<tr>
<td>Total:</td>
<td>542</td>
<td>507</td>
<td>668</td>
<td>93.5%</td>
</tr>
</tbody>
</table>

### OTHER:

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

**Address:** 4100 Well Spring Drive  
**City:** Greensboro  
**State:** NC  
**Zip Code:** 27410-8857  
**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

### FEES:

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$93,590</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,841</td>
</tr>
</tbody>
</table>

**Note:**  
- Fees listed have been provided by the community.  
- All fees listed are for reference and comparison purposes only.  
- 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:

<table>
<thead>
<tr>
<th>Contract Options:</th>
<th>Entrance Fee Refund Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

### OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>261</td>
<td>256</td>
<td>331</td>
<td>98.1%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>72</td>
<td>60</td>
<td>60</td>
<td>83.3%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>70</td>
<td>57</td>
<td>57</td>
<td>81.4%</td>
</tr>
<tr>
<td>Total:</td>
<td>403</td>
<td>373</td>
<td>448</td>
<td>92.6%</td>
</tr>
</tbody>
</table>

### OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

North Carolina Department of Insurance
Wesley Pines Retirement Community

1000 Wesley Pines Road
Lumberton, NC 28358-2148

Phone Number: (910) 738-9691
Fax Number: (910) 738-8905

Self Description:
Redefining the meaning of care, Wesley Pines delivers premium care to every resident in a personable and secure environment encouraging wellness and the feeling of home. Peacefully located on 49 acres, Wesley Pines is perfectly situated amongst towering pine trees in Lumberton, North Carolina. Centrally located to shopping malls and a mile from I-95, our community makes for the perfect peaceful evening after a full day of activity both on and off campus.

At home, residents enjoy restaurant-style dining and worry-free living with our personable staff working to make your retirement enjoyable and vibrant. Our community invokes the warm hospitality and caring environment that inspires active, independent residents to build relationships, continue lifelong hobbies, and pursue new interests. We offer a mix of social, cultural, spiritual, and educational activities throughout each day to accommodate even the busiest of schedules. Whether it’s through on-campus involvement or off-campus volunteering, our staff is here to help residents make the most of their retirement. Hone into your creative side at an art or creative writing class. Teach children to read at a local elementary school. Enjoy a production or art show at one of the many local performing arts centers and museums. Sign up for a speaker series on health and wellness. At Wesley Pines, the options are as endless as your curiosity and passion.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$62,773</td>
<td>$328,828</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,596</td>
<td>$3,449</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:

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

Entrance Fee Refund Options:

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

CONTRACT AND REFUND OPTIONS:

Independent Living Units: 24
Assisted Living Units: 36
Nursing Beds: 62

Total: 122

Percent Occupied:
Independent Living Units: 100.0%
Assisted Living Units: 88.9%
Nursing Beds: 80.6%
Total: 86.9%

OTHER:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

OTHER:

- Toll Free Number: 1-888-385-5600
- Web Page: www.wesleypines.org
- Year Opened: 1977
- License Provider: United Methodist Retirement Homes, Inc.
- Provider Tax Status: Not-For-Profit

OCCUPANCY:

<table>
<thead>
<tr>
<th>Units</th>
<th>Occupied</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>24</td>
<td>32</td>
<td>100.0%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>36</td>
<td>34</td>
<td>88.9%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>62</td>
<td>50</td>
<td>80.6%</td>
</tr>
<tr>
<td>Total:</td>
<td>122</td>
<td>116</td>
<td>86.9%</td>
</tr>
</tbody>
</table>
**Self Description:**

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 homes 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!
WhiteStone: A Masonic and Eastern Star Community

Address: 700 South Holden Road
City: Greensboro
State: NC
Zip Code: 27407-2321
Phone Number: (336) 299-0031
Fax Number: (336) 547-2999
Toll Free Number: (88) 855-8654
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 community 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 to pursue their personal interests.

WhiteStone is licensed by the state of North Carolina as a Continuing Care Retirement Community offering independent living, assisted living, long-term care as well as short-term rehabilitation. WhiteStone is both Medicare and Medicaid certified.

FEES:

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$52,500</td>
<td>$537,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,520</td>
<td>$3,511</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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 Options:  
- Extensive
- Modified
- Fee for Service
- Equity
- Rental (No Entrance Fee)
- Assignment of Assets

Entrance Fee Refund Options:  
- No Refund
- Fully Declining Refund
- 50% Refund
- 80% Refund
- 90% Refund
- Full Refund

OCCUPANCY:

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>178</td>
<td>144</td>
<td>182</td>
<td>80.9%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>100.0%</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>88</td>
<td>86</td>
<td>86</td>
<td>97.7%</td>
</tr>
<tr>
<td>Total</td>
<td>278</td>
<td>242</td>
<td>280</td>
<td>87.1%</td>
</tr>
</tbody>
</table>

OTHER:
- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

Note:
- All fees listed are for reference and comparison purposes only.
- 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.

Toll Free Number: (88) 855-8654

North Carolina Department of Insurance
**Windsor Point**

**Address:** 1221 Broad Street

**City:** Fuquay-Varina  
**State:** NC  
**Zip Code:** 27526-3602

**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.

**Self Description:**

Windsor Point is located at the intersection of Highway 55 and Wilbon Road on 17 acres in the heart of Fuquay-Varina, NC. Windsor Point is beautifully decorated and boasts attractive English brick and stucco architecture. 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 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 60 years in North Carolina’s healthcare industry. Lower entrance fees are available for healthcare admissions.

**FEES:**

<table>
<thead>
<tr>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$55,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,356</td>
</tr>
</tbody>
</table>

**Note:**

- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:**

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

**OCCUPANCY:**

<table>
<thead>
<tr>
<th></th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units:</td>
<td>141</td>
<td>122</td>
<td>150</td>
<td>86.5%</td>
</tr>
<tr>
<td>Assisted Living Units:</td>
<td>55</td>
<td>47</td>
<td>47</td>
<td>85.5%</td>
</tr>
<tr>
<td>Nursing Beds:</td>
<td>45</td>
<td>25</td>
<td>25</td>
<td>55.6%</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>241</strong></td>
<td><strong>194</strong></td>
<td><strong>222</strong></td>
<td><strong>80.5%</strong></td>
</tr>
</tbody>
</table>

**OTHER:**

- Dementia Units Available
- Direct Admission to Assisted Living  
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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
Windsor Run Retirement Community

Address: 2030 Windsor Run Lane
City: Matthews
State: NC
Zip Code: 28105
Phone Number: (704) 443-6300
Fax Number:
Toll Free Number: (800) 357-4492
County: Mecklenburg
Web Page: www.ericksonliving.com/windsor-run
Year Opened: 2018
Licensed Provider: Windsor Run, LLC.

Self Description:
Windsor Run is a senior living community in southern North Carolina, located on approximately 60 acres of a 105-acre lot, developed and managed by Erickson Living. Our mission is to share our gifts to create communities that celebrate life.

Windsor Run accepted its first independent living residents in May 2018. As a resident of Windsor Run, you will experience maintenance-free living in your apartment home plus amenities, including an all-season swimming pool, restaurants featuring signature dining, a fitness center, and an on-site medical center staffed by full-time medical professionals. Join in our robust activities program designed with your interests in mind; from travel to fitness to educational classes.

As a fee-for-service community, you won’t pay in advance for services you may never need. Here, you only pay for a higher level of health care when and if you need it. Healthcare services are planned as part of our next expansion.

Fees:

<table>
<thead>
<tr>
<th>Service</th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entrance Fees</td>
<td>$135,000</td>
<td>$576,000</td>
</tr>
<tr>
<td>Monthly Fees</td>
<td>$2,216</td>
<td>$4,009</td>
</tr>
</tbody>
</table>

Note:
- Fees listed have been provided by the community.
- All fees listed are for reference and comparison purposes only.
- 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:

<table>
<thead>
<tr>
<th>Contract Options</th>
<th>Entrance Fee Refund Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensive</td>
<td>No Refund</td>
</tr>
<tr>
<td>Modified</td>
<td>Fully Declining Refund</td>
</tr>
<tr>
<td>Fee for Service</td>
<td>50% Refund</td>
</tr>
<tr>
<td>Equity</td>
<td>80% Refund</td>
</tr>
<tr>
<td>Rental (No Entrance Fee)</td>
<td>90% Refund</td>
</tr>
<tr>
<td>Assignment of Assets</td>
<td>Full Refund</td>
</tr>
</tbody>
</table>

Occupancy:

<table>
<thead>
<tr>
<th>Service</th>
<th>Total Units</th>
<th>Occupied Units</th>
<th>Residents</th>
<th>Percent Occupied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent Living Units</td>
<td>318</td>
<td>307</td>
<td>446</td>
<td>96.5%</td>
</tr>
<tr>
<td>Assisted Living Units</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Nursing Beds</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Total</td>
<td>318</td>
<td>307</td>
<td>446</td>
<td>96.5%</td>
</tr>
</tbody>
</table>

Other:

- Dementia Units Available
- Direct Admission to Assisted Living
- Direct Admission to Nursing
- Utilities (some or all) in Monthly Fees
- Waiting List for (some or all) Units
- Resident(s) 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

Toll Free Number: (800) 357-4492

North Carolina Department of Insurance
## Appendix 1 - Summary of Contract and Refund Options

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Contract Options</th>
<th>Fee for Service</th>
<th>Equity</th>
<th>Rental</th>
<th>No Refund</th>
<th>Declining Refund</th>
<th>50% Refund</th>
<th>80% Refund</th>
<th>90% Refund</th>
<th>Full Refund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abernethy Laurels</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Aldersgate</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Arbor Acres</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Ardenwoods</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Belle Meade and Pine Knoll</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Brookdale Carriage Club Providence</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Brookridge Retirement Community</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Brooks-Howell Home</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Carmel Hills</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Carol Woods</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Carolina Bay at Autumn Hall</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Carolina Meadows Retirement Community</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Carolina Village</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Covenant Village</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Croasdaile Village Retirement Community</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Cypress Glen Retirement Community</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Deerfield Episcopal Retirement Community</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Friends Homes, Inc.</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Facility Name</td>
<td>Extensive</td>
<td>Modified</td>
<td>Fee for Service</td>
<td>Equity</td>
<td>Rental</td>
<td>No Refund</td>
<td>Declining Refund</td>
<td>50% Refund</td>
<td>80% Refund</td>
<td>90% Refund</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>-----------</td>
<td>----------</td>
<td>-----------------</td>
<td>--------</td>
<td>--------</td>
<td>-----------</td>
<td>------------------</td>
<td>------------</td>
<td>------------</td>
<td>------------</td>
</tr>
<tr>
<td>Galloway Ridge at Fearrington</td>
<td>✔</td>
<td></td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Givens Estates</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Givens Highland Farms</td>
<td></td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Glenaire</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Grace Ridge Retirement Community</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Matthews Glen</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Oak Creek Apartments</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Penick Village</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Pennybyrn at Maryfield</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Piedmont Crossing</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Pisgah Valley Retirement Community</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Pittsboro Christian Village</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Plantation Village</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Quail Haven Village</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>River Landing at Sandy Ridge</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Salemtowne</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Scotia Village</td>
<td></td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Searstone</td>
<td>✔</td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Sharon Towers</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Sharon Village Apartments</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

North Carolina Department of Insurance  Appendix 1
<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Extensive</th>
<th>Modified</th>
<th>Fee for Service</th>
<th>Equity</th>
<th>Rental</th>
<th>No Refund</th>
<th>Declining Refund</th>
<th>50% Refund</th>
<th>80% Refund</th>
<th>90% Refund</th>
<th>Full Refund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southminster</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Springmoor Life Care Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stanley Total Living Center</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Barclay at SouthPark</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cardinal at North Hills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cedars of Chapel Hill</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cypress of Charlotte</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cypress of Raleigh</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Forest at Duke</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Gardens of Taylor Glen</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Oaks at Whitaker Glen</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Pines at Davidson</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Templeton of Cary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Village at Brookwood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trinity Oaks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tryon Estates</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twin Lakes Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Well-Spring Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wesley Pines Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White Oak Village Apartments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facility Name</td>
<td>Contract Options</td>
<td>Refund Options</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>------------------</td>
<td>----------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Extensive</td>
<td>Modified</td>
<td>Service</td>
<td>Equity</td>
<td>Rental</td>
<td>No Refund</td>
<td>Declining Refund</td>
<td>50% Refund</td>
<td>80% Refund</td>
<td>90% Refund</td>
<td>Full Refund</td>
</tr>
<tr>
<td>WhiteStone: A Masonic and Eastern Star Community</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Windsor Point</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Windsor Run Retirement Community</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

**Total Facilities:** 61
## Appendix 2 - Other Services/Features

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
<th>O</th>
<th>P</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abernethy Laurels</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Aldersgate</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Arbor Acres</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ardenwoods</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Belle Meade and Pine Knoll</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Brookdale Carriage Club Providence</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Brookridge Retirement Community</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Brooks-Howell Home</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Carmel Hills</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Carol Woods</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Carolina Bay at Autumn Hall</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Carolina Meadows Retirement Community</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Carolina Village</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Covenant Village</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Croasdaile Village Retirement Community</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Cypress Glen Retirement Community</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Deerfield Episcopal Retirement Community</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Friends Homes, Inc.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Galloway Ridge at Fearrington</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Givens Estates</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Givens Highland Farms</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Glenaire</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Grace Ridge Retirement Community</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Matthews Glen</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Oak Creek Apartments</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Penick Village</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Pennybyrn at Maryfield</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Piedmont Crossing</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

North Carolina Department of Insurance
A = Dementia Units Available
B = Direct Admission to Assisted Living
C = Direct Admission to Nursing
D = Emergency Call System
E = Exercise Room or Programs
F = Undergoing Expansion
G = Housekeeping (some or all) in Monthly Fees
H = Meals (some or all) in Monthly Fees

I = Medicaid Certified
J = Medicare Certified
K = Pets (some) Allowed
L = Residents on Board of Directors
M = Swimming Pool/Spa/Sauna on Site
N = Transportation Available
O = Utilities (some or all) in Monthly Fees
P = Waiting List on (some or all) Units

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
<th>O</th>
<th>P</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pisgah Valley Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pittsboro Christian Village</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plantation Village</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quail Haven Village</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>River Landing at Sandy Ridge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salenstowne</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scotia Village</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Searstone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharon Towers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharon Village Apartments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southminster</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Springmoor Life Care Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stanley Total Living Center</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Barclay at SouthPark</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cardinal at North Hills</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cedars of Chapel Hill</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cypress of Charlotte</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cypress of Raleigh</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Forest at Duke</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Gardens of Taylor Glen</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Oaks at Whitaker Glen</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Pines at Davidson</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Templeton of Cary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Village at Brookwood</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trinity Oaks</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tryon Estates</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twin Lakes Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Well-Spring Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wesley Pines Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White Oak Village Apartments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

North Carolina Department of Insurance

Appendix 2
<table>
<thead>
<tr>
<th>Facility Name</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
<th>O</th>
<th>P</th>
</tr>
</thead>
<tbody>
<tr>
<td>WhiteStone: A Masonic and Eastern Star Com</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windsor Point</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windsor Run Retirement Community</td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Facilities:** 61
## Appendix 3 - Occupancy

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Available</th>
<th></th>
<th>Occupied</th>
<th></th>
<th>Residents</th>
<th></th>
<th>Occupancy %</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ILU</td>
<td>ALU</td>
<td>Nursing</td>
<td>Beds</td>
<td>ILU</td>
<td>ALU</td>
<td>Nursing</td>
<td>Beds</td>
</tr>
<tr>
<td>Abernethy Laurels</td>
<td>189</td>
<td>18</td>
<td>174</td>
<td></td>
<td>156</td>
<td>18</td>
<td>148</td>
<td></td>
</tr>
<tr>
<td>Aldersgate</td>
<td>309</td>
<td>112</td>
<td>120</td>
<td></td>
<td>273</td>
<td>108</td>
<td>113</td>
<td></td>
</tr>
<tr>
<td>Arbor Acres</td>
<td>261</td>
<td>106</td>
<td>83</td>
<td></td>
<td>250</td>
<td>95</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Ardenwoods</td>
<td>92</td>
<td>48</td>
<td>0</td>
<td></td>
<td>86</td>
<td>40</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Belle Meade and Pine Knoll</td>
<td>310</td>
<td>78</td>
<td>169</td>
<td></td>
<td>257</td>
<td>55</td>
<td>149</td>
<td></td>
</tr>
<tr>
<td>Brookdale Carriage Club Providence</td>
<td>275</td>
<td>90</td>
<td>42</td>
<td></td>
<td>236</td>
<td>80</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Brookridge Retirement Community</td>
<td>137</td>
<td>36</td>
<td>77</td>
<td></td>
<td>82</td>
<td>30</td>
<td>56</td>
<td></td>
</tr>
<tr>
<td>Brooks-Howell Home</td>
<td>61</td>
<td>0</td>
<td>54</td>
<td></td>
<td>25</td>
<td>0</td>
<td>37</td>
<td></td>
</tr>
<tr>
<td>Carmel Hills</td>
<td>41</td>
<td>38</td>
<td>0</td>
<td></td>
<td>36</td>
<td>23</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Carol Woods</td>
<td>315</td>
<td>89</td>
<td>30</td>
<td></td>
<td>300</td>
<td>78</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Carolina Bay at Autumn Hall</td>
<td>146</td>
<td>18</td>
<td>12</td>
<td></td>
<td>130</td>
<td>18</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Carolina Meadows Retirement Community</td>
<td>448</td>
<td>95</td>
<td>86</td>
<td></td>
<td>428</td>
<td>66</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>Carolina Village</td>
<td>399</td>
<td>60</td>
<td>58</td>
<td></td>
<td>385</td>
<td>54</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>Covenant Village</td>
<td>182</td>
<td>42</td>
<td>34</td>
<td></td>
<td>173</td>
<td>35</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Croasdaile Village Retirement Community</td>
<td>460</td>
<td>30</td>
<td>110</td>
<td></td>
<td>440</td>
<td>28</td>
<td>97</td>
<td></td>
</tr>
<tr>
<td>Cypress Glen Retirement Community</td>
<td>199</td>
<td>42</td>
<td>30</td>
<td></td>
<td>191</td>
<td>39</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Deerfield Episcopal Retirement Community</td>
<td>378</td>
<td>62</td>
<td>62</td>
<td></td>
<td>367</td>
<td>58</td>
<td>58</td>
<td></td>
</tr>
</tbody>
</table>

*North Carolina Department of Insurance*
<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Available</th>
<th></th>
<th>Nursing Beds</th>
<th>Occupied</th>
<th></th>
<th>Nursing Beds</th>
<th>Residents</th>
<th></th>
<th>Nursing Beds</th>
<th>Occupancy %</th>
<th></th>
<th>Nursing Beds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends Homes, Inc.</td>
<td>ILU 360</td>
<td>ALU 100</td>
<td>109</td>
<td>ILU 345</td>
<td>ALU 76</td>
<td>106</td>
<td>ILU 436</td>
<td>ALU 76</td>
<td>106</td>
<td>95.8%</td>
<td>76.0%</td>
<td>97.2%</td>
</tr>
<tr>
<td>Galloway Ridge at Fearrington</td>
<td>ILU 315</td>
<td>ALU 51</td>
<td>40</td>
<td>ILU 304</td>
<td>ALU 28</td>
<td>30</td>
<td>ILU 428</td>
<td>ALU 28</td>
<td>30</td>
<td>96.5%</td>
<td>54.9%</td>
<td>75.0%</td>
</tr>
<tr>
<td>Givens Estates</td>
<td>ILU 409</td>
<td>ALU 61</td>
<td>70</td>
<td>ILU 393</td>
<td>ALU 50</td>
<td>63</td>
<td>ILU 542</td>
<td>ALU 50</td>
<td>63</td>
<td>96.1%</td>
<td>82.0%</td>
<td>90.0%</td>
</tr>
<tr>
<td>Givens Highland Farms</td>
<td>ILU 278</td>
<td>ALU 30</td>
<td>60</td>
<td>ILU 255</td>
<td>ALU 19</td>
<td>51</td>
<td>ILU 351</td>
<td>ALU 19</td>
<td>51</td>
<td>91.7%</td>
<td>63.3%</td>
<td>85.0%</td>
</tr>
<tr>
<td>Glenaire</td>
<td>ILU 224</td>
<td>ALU 9</td>
<td>71</td>
<td>ILU 218</td>
<td>ALU 9</td>
<td>67</td>
<td>ILU 304</td>
<td>ALU 9</td>
<td>67</td>
<td>97.3%</td>
<td>100.0%</td>
<td>94.4%</td>
</tr>
<tr>
<td>Grace Ridge Retirement Community</td>
<td>ILU 145</td>
<td>ALU 47</td>
<td>25</td>
<td>ILU 118</td>
<td>ALU 33</td>
<td>20</td>
<td>ILU 152</td>
<td>ALU 33</td>
<td>20</td>
<td>81.4%</td>
<td>70.2%</td>
<td>80.0%</td>
</tr>
<tr>
<td>Matthews Glen</td>
<td>ILU 507</td>
<td>ALU 60</td>
<td>80</td>
<td>ILU 483</td>
<td>ALU 57</td>
<td>75</td>
<td>ILU 657</td>
<td>ALU 57</td>
<td>75</td>
<td>95.3%</td>
<td>95.0%</td>
<td>93.8%</td>
</tr>
<tr>
<td>Oak Creek Apartments</td>
<td>ILU 54</td>
<td>ALU 0</td>
<td>160</td>
<td>ILU 49</td>
<td>ALU 0</td>
<td>120</td>
<td>ILU 57</td>
<td>ALU 0</td>
<td>120</td>
<td>90.7%</td>
<td>N/A</td>
<td>75.0%</td>
</tr>
<tr>
<td>Penick Village</td>
<td>ILU 138</td>
<td>ALU 42</td>
<td>50</td>
<td>ILU 132</td>
<td>ALU 35</td>
<td>36</td>
<td>ILU 180</td>
<td>ALU 35</td>
<td>36</td>
<td>95.7%</td>
<td>83.3%</td>
<td>72.0%</td>
</tr>
<tr>
<td>Pennymtn at Maryfield</td>
<td>ILU 180</td>
<td>ALU 36</td>
<td>125</td>
<td>ILU 178</td>
<td>ALU 30</td>
<td>110</td>
<td>ILU 237</td>
<td>ALU 30</td>
<td>112</td>
<td>98.9%</td>
<td>83.3%</td>
<td>88.0%</td>
</tr>
<tr>
<td>Piedmont Crossing</td>
<td>ILU 169</td>
<td>ALU 20</td>
<td>114</td>
<td>ILU 163</td>
<td>ALU 16</td>
<td>89</td>
<td>ILU 214</td>
<td>ALU 16</td>
<td>89</td>
<td>96.4%</td>
<td>80.0%</td>
<td>78.1%</td>
</tr>
<tr>
<td>Pisgah Valley Retirement Community</td>
<td>ILU 72</td>
<td>ALU 24</td>
<td>118</td>
<td>ILU 69</td>
<td>ALU 20</td>
<td>106</td>
<td>ILU 88</td>
<td>ALU 20</td>
<td>106</td>
<td>95.8%</td>
<td>83.3%</td>
<td>89.8%</td>
</tr>
<tr>
<td>Pittsboro Christian Village</td>
<td>ILU 68</td>
<td>ALU 40</td>
<td>0</td>
<td>ILU 65</td>
<td>ALU 21</td>
<td>0</td>
<td>ILU 87</td>
<td>ALU 21</td>
<td>0</td>
<td>95.6%</td>
<td>52.5%</td>
<td>N/A</td>
</tr>
<tr>
<td>Plantation Village</td>
<td>ILU 248</td>
<td>ALU 0</td>
<td>0</td>
<td>ILU 233</td>
<td>ALU 0</td>
<td>0</td>
<td>ILU 304</td>
<td>ALU 0</td>
<td>0</td>
<td>94.0%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Quail Haven Village</td>
<td>ILU 80</td>
<td>ALU 0</td>
<td>60</td>
<td>ILU 58</td>
<td>ALU 0</td>
<td>19</td>
<td>ILU 79</td>
<td>ALU 0</td>
<td>52</td>
<td>72.5%</td>
<td>N/A</td>
<td>31.7%</td>
</tr>
<tr>
<td>River Landing at Sandy Ridge</td>
<td>ILU 298</td>
<td>ALU 56</td>
<td>60</td>
<td>ILU 281</td>
<td>ALU 55</td>
<td>56</td>
<td>ILU 418</td>
<td>ALU 55</td>
<td>56</td>
<td>94.3%</td>
<td>98.2%</td>
<td>93.3%</td>
</tr>
<tr>
<td>Salemtowne</td>
<td>ILU 196</td>
<td>ALU 66</td>
<td>100</td>
<td>ILU 173</td>
<td>ALU 32</td>
<td>79</td>
<td>ILU 241</td>
<td>ALU 32</td>
<td>79</td>
<td>88.3%</td>
<td>48.5%</td>
<td>79.0%</td>
</tr>
<tr>
<td>Scotia Village</td>
<td>ILU 126</td>
<td>ALU 32</td>
<td>58</td>
<td>ILU 118</td>
<td>ALU 28</td>
<td>52</td>
<td>ILU 161</td>
<td>ALU 28</td>
<td>52</td>
<td>93.7%</td>
<td>87.5%</td>
<td>89.7%</td>
</tr>
<tr>
<td>Searstone</td>
<td>ILU 169</td>
<td>ALU 14</td>
<td>25</td>
<td>ILU 166</td>
<td>ALU 12</td>
<td>13</td>
<td>ILU 245</td>
<td>ALU 12</td>
<td>13</td>
<td>98.2%</td>
<td>85.7%</td>
<td>52.0%</td>
</tr>
<tr>
<td>Facility Name</td>
<td>Available</td>
<td>Nursing Beds</td>
<td>Occupied</td>
<td>Nursing Beds</td>
<td>Residents</td>
<td>Nursing Beds</td>
<td>Occupancy %</td>
<td>Nursing Beds</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>-----------</td>
<td>--------------</td>
<td>----------</td>
<td>--------------</td>
<td>-----------</td>
<td>--------------</td>
<td>-------------</td>
<td>--------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharon Towers</td>
<td>229</td>
<td>40</td>
<td>94</td>
<td>202</td>
<td>32</td>
<td>60</td>
<td>88.2%</td>
<td>63.8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sharon Village Apartments</td>
<td>34</td>
<td>0</td>
<td>180</td>
<td>32</td>
<td>0</td>
<td>143</td>
<td>94.1%</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southminster</td>
<td>279</td>
<td>25</td>
<td>60</td>
<td>259</td>
<td>24</td>
<td>39</td>
<td>92.8%</td>
<td>65.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Springmoor Life Care Retirement Community</td>
<td>388</td>
<td>18</td>
<td>173</td>
<td>364</td>
<td>17</td>
<td>92</td>
<td>93.8%</td>
<td>53.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stanley Total Living Center</td>
<td>28</td>
<td>40</td>
<td>106</td>
<td>23</td>
<td>34</td>
<td>95</td>
<td>82.1%</td>
<td>89.6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Barclay at SouthPark</td>
<td>165</td>
<td>108</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cardinal at North Hills</td>
<td>165</td>
<td>55</td>
<td>15</td>
<td>164</td>
<td>42</td>
<td>15</td>
<td>99.4%</td>
<td>100.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cedars of Chapel Hill</td>
<td>306</td>
<td>4</td>
<td>74</td>
<td>305</td>
<td>4</td>
<td>52</td>
<td>99.7%</td>
<td>70.3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cypress of Charlotte</td>
<td>304</td>
<td>4</td>
<td>56</td>
<td>307</td>
<td>4</td>
<td>50</td>
<td>101.0%</td>
<td>89.3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Cypress of Raleigh</td>
<td>262</td>
<td>4</td>
<td>36</td>
<td>262</td>
<td>4</td>
<td>33</td>
<td>100.0%</td>
<td>91.7%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Forest at Duke</td>
<td>249</td>
<td>34</td>
<td>58</td>
<td>235</td>
<td>29</td>
<td>50</td>
<td>94.4%</td>
<td>86.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Gardens of Taylor Glen</td>
<td>125</td>
<td>24</td>
<td>24</td>
<td>95</td>
<td>19</td>
<td>12</td>
<td>76.0%</td>
<td>50.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Oaks at Whitaker Glen</td>
<td>96</td>
<td>0</td>
<td>139</td>
<td>76</td>
<td>0</td>
<td>105</td>
<td>79.2%</td>
<td>75.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Pines at Davidson</td>
<td>250</td>
<td>30</td>
<td>51</td>
<td>243</td>
<td>27</td>
<td>49</td>
<td>97.2%</td>
<td>96.1%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Templeton of Cary</td>
<td>199</td>
<td>92</td>
<td>28</td>
<td>32</td>
<td>6</td>
<td>7</td>
<td>16.1%</td>
<td>25.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Village at Brookwood</td>
<td>155</td>
<td>24</td>
<td>105</td>
<td>151</td>
<td>19</td>
<td>87</td>
<td>97.4%</td>
<td>82.9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trinity Oaks</td>
<td>179</td>
<td>50</td>
<td>115</td>
<td>170</td>
<td>50</td>
<td>100</td>
<td>95.0%</td>
<td>87.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tryon Estates</td>
<td>286</td>
<td>44</td>
<td>47</td>
<td>256</td>
<td>35</td>
<td>38</td>
<td>89.5%</td>
<td>80.9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twin Lakes Community</td>
<td>406</td>
<td>20</td>
<td>116</td>
<td>384</td>
<td>16</td>
<td>107</td>
<td>94.6%</td>
<td>92.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

North Carolina Department of Insurance

Appendix 3
<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Available ILU</th>
<th>Available ALU</th>
<th>Nursing Beds</th>
<th>Occupied ILU</th>
<th>Occupied ALU</th>
<th>Nursing Beds</th>
<th>Residents ILU</th>
<th>Residents ALU</th>
<th>Nursing Beds</th>
<th>Occupancy % ILU</th>
<th>Occupancy % ALU</th>
<th>Occupancy % Nursing Beds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Well-Spring Retirement Community</td>
<td>261</td>
<td>72</td>
<td>70</td>
<td>256</td>
<td>60</td>
<td>57</td>
<td>331</td>
<td>60</td>
<td>57</td>
<td>98.1%</td>
<td>83.3%</td>
<td>81.4%</td>
</tr>
<tr>
<td>Wesley Pines Retirement Community</td>
<td>24</td>
<td>36</td>
<td>62</td>
<td>24</td>
<td>32</td>
<td>50</td>
<td>32</td>
<td>34</td>
<td>50</td>
<td>100.0%</td>
<td>88.9%</td>
<td>80.6%</td>
</tr>
<tr>
<td>White Oak Village Apartments</td>
<td>101</td>
<td>18</td>
<td>70</td>
<td>95</td>
<td>15</td>
<td>59</td>
<td>121</td>
<td>15</td>
<td>59</td>
<td>94.1%</td>
<td>83.3%</td>
<td>84.3%</td>
</tr>
<tr>
<td>WhiteStone: A Masonic and Eastern Star Com</td>
<td>178</td>
<td>12</td>
<td>88</td>
<td>144</td>
<td>12</td>
<td>86</td>
<td>182</td>
<td>12</td>
<td>86</td>
<td>80.9%</td>
<td>100.0%</td>
<td>97.7%</td>
</tr>
<tr>
<td>Windsor Point</td>
<td>141</td>
<td>55</td>
<td>45</td>
<td>122</td>
<td>47</td>
<td>25</td>
<td>150</td>
<td>47</td>
<td>25</td>
<td>86.5%</td>
<td>85.5%</td>
<td>55.6%</td>
</tr>
<tr>
<td>Windsor Run Retirement Community</td>
<td>318</td>
<td>0</td>
<td>0</td>
<td>307</td>
<td>0</td>
<td>0</td>
<td>446</td>
<td>0</td>
<td>0</td>
<td>96.5%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Totals</td>
<td>13,160</td>
<td>2,461</td>
<td>4,278</td>
<td>12,124</td>
<td>1,874</td>
<td>3,462</td>
<td>16,610</td>
<td>1,884</td>
<td>3,502</td>
<td>92.1%</td>
<td>76.1%</td>
<td>80.9%</td>
</tr>
</tbody>
</table>
### Appendix 4 - CCRCs by County

#### STATE OF NORTH CAROLINA

County Index Map

---

<table>
<thead>
<tr>
<th>County</th>
<th>City</th>
<th>Name</th>
<th>Address</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alamance</td>
<td>Burlington</td>
<td>Oak Creek Apartments</td>
<td>343 Baldwin Road</td>
<td>NC</td>
<td>27217-3426</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Village at Brookwood</td>
<td>1860 Brookwood Avenue</td>
<td>NC</td>
<td>27215-3200</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Twin Lakes Community</td>
<td>3701 Wade Coble Drive</td>
<td>NC</td>
<td>27215-9756</td>
</tr>
<tr>
<td>Buncombe</td>
<td>Arden</td>
<td>Ardenwoods</td>
<td>2400 Appalachian Boulevard</td>
<td>NC</td>
<td>28704-8327</td>
</tr>
<tr>
<td></td>
<td>Asheville</td>
<td>Brooks-Howell Home</td>
<td>266 Merrimon Avenue</td>
<td>NC</td>
<td>28801-</td>
</tr>
<tr>
<td>County</td>
<td>City</td>
<td>Name</td>
<td>Address</td>
<td>State</td>
<td>Zip Code</td>
</tr>
<tr>
<td>---------</td>
<td>------------</td>
<td>-------------------------------------</td>
<td>----------------------------</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Deerfield Episcopal Retirement</td>
<td>1617 Hendersonville Road</td>
<td>NC</td>
<td>28803-3454</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Community</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Givens Estates</td>
<td>2360 Sweeten Creek Road</td>
<td>NC</td>
<td>28803-2030</td>
</tr>
<tr>
<td></td>
<td>Black Mountain</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Givens Highland Farms</td>
<td>200 Tabernacle Road</td>
<td>NC</td>
<td>28711-7733</td>
</tr>
<tr>
<td></td>
<td>Candler</td>
<td>Pisgah Valley Retirement Community</td>
<td>104 Holcombe Cove Road</td>
<td>NC</td>
<td>28715-9450</td>
</tr>
<tr>
<td>Burke</td>
<td></td>
<td>Grace Ridge Retirement Community</td>
<td>500 Lenoir Road</td>
<td>NC</td>
<td>28655-2666</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cabarrus</td>
<td></td>
<td>The Gardens of Taylor Glen</td>
<td>3700 Taylor Glen Lane</td>
<td>NC</td>
<td>28027-</td>
</tr>
<tr>
<td></td>
<td>Concord</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Abernethy Laurels</td>
<td>102 Leonard Avenue</td>
<td>NC</td>
<td>28658-9649</td>
</tr>
<tr>
<td>Catawba</td>
<td></td>
<td>Carolina Meadows Retirement Community</td>
<td>100 Carolina Meadows</td>
<td>NC</td>
<td>27517-8510</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Community</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pittsboro</td>
<td>Galloway Ridge at Fearrington</td>
<td>3000 Galloway Ridge</td>
<td>NC</td>
<td>27312-8639</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pittsboro Christian Village</td>
<td>1825 East Street</td>
<td>NC</td>
<td>27312-8842</td>
</tr>
<tr>
<td></td>
<td>Davidson</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Thomasville</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td>City</td>
<td>Name</td>
<td>Address</td>
<td>State</td>
<td>Zip Code</td>
</tr>
<tr>
<td>----------</td>
<td>------------</td>
<td>---------------------------------------</td>
<td>-----------------------------</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>Durham</td>
<td>Piedmont</td>
<td>Crossing</td>
<td>100 Hedrick Drive</td>
<td>NC</td>
<td>27360-6009</td>
</tr>
<tr>
<td></td>
<td>Chapel Hill</td>
<td>The Cedars of Chapel Hill</td>
<td>100 Cedar Club Circle</td>
<td>NC</td>
<td>27517-</td>
</tr>
<tr>
<td>Durham</td>
<td>Croasdaile Village Retirement Community</td>
<td>2600 Croasdaile Farm Parkway</td>
<td>NC</td>
<td>27705-1332</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Forest at Duke</td>
<td>2701 Pickett Road</td>
<td>NC</td>
<td>27705-5688</td>
<td></td>
</tr>
<tr>
<td>Forsyth</td>
<td>Winston-Salem</td>
<td>Arbor Acres</td>
<td>1240 Arbor Road</td>
<td>NC</td>
<td>27104-1197</td>
</tr>
<tr>
<td></td>
<td>Brookridge Retirement Community</td>
<td>1199 Hayes Forest Drive</td>
<td>NC</td>
<td>27106-</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Salemtowne</td>
<td>1000 Salemtowne Drive</td>
<td>NC</td>
<td>27106-3294</td>
<td></td>
</tr>
<tr>
<td>Gaston</td>
<td>Gastonia</td>
<td>Covenant Village</td>
<td>1351 Robinwood Road</td>
<td>NC</td>
<td>28054-1631</td>
</tr>
<tr>
<td></td>
<td>Stanley</td>
<td>Stanley Total Living Center</td>
<td>514 Old Mt. Holly Road</td>
<td>NC</td>
<td>28164-</td>
</tr>
<tr>
<td>Guilford</td>
<td>Colfax</td>
<td>River Landing at Sandy Ridge</td>
<td>1575 John Knox Drive</td>
<td>NC</td>
<td>27235-9662</td>
</tr>
<tr>
<td></td>
<td>Greensboro</td>
<td>Friends Homes, Inc.</td>
<td>925 New Garden Road</td>
<td>NC</td>
<td>27410-3267</td>
</tr>
<tr>
<td>County</td>
<td>City</td>
<td>Name</td>
<td>Address</td>
<td>State</td>
<td>Zip Code</td>
</tr>
<tr>
<td>-------------</td>
<td>------------</td>
<td>----------------------------------------</td>
<td>-----------------------</td>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>High Point</td>
<td></td>
<td>Well-Spring Retirement Community</td>
<td>4100 Well Spring Drive</td>
<td>NC</td>
<td>27410-8857</td>
</tr>
<tr>
<td></td>
<td></td>
<td>WhiteStone: A Masonic and Eastern Star Community</td>
<td>700 South Holden Road</td>
<td>NC</td>
<td>27407-2321</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Pennybyrn at Maryfield</td>
<td>109 Penny Road</td>
<td>NC</td>
<td>27260-2611</td>
</tr>
<tr>
<td>Henderson</td>
<td>Hendersonville</td>
<td>Carolina Village</td>
<td>600 Carolina Village Road</td>
<td>NC</td>
<td>28792-2892</td>
</tr>
<tr>
<td>Mecklenburg</td>
<td>Charlotte</td>
<td>Aldersgate</td>
<td>3800 Shamrock Drive</td>
<td>NC</td>
<td>28215-3220</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Brookdale Carriage Club Providence</td>
<td>5800 Old Providence Road</td>
<td>NC</td>
<td>28226-6872</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Carmel Hills</td>
<td>2801 Carmel Road</td>
<td>NC</td>
<td>28226-6382</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sharon Towers</td>
<td>5100 Sharon Road</td>
<td>NC</td>
<td>28210-4768</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sharon Village Apartments</td>
<td>4009 Craig Avenue</td>
<td>NC</td>
<td>28211-2505</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Southminster</td>
<td>8919 Park Road</td>
<td>NC</td>
<td>28210-7629</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Barclay at SouthPark</td>
<td>4801 Barclay Downs Drive</td>
<td>NC</td>
<td>28210-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The Cypress of Charlotte</td>
<td>3442 Cypress Club Drive</td>
<td>NC</td>
<td>28210-2467</td>
</tr>
<tr>
<td>Davidson</td>
<td></td>
<td>The Pines at Davidson</td>
<td>400 Avinger Lane</td>
<td>NC</td>
<td>28036-8894</td>
</tr>
<tr>
<td>Matthews</td>
<td></td>
<td>Matthews Glen</td>
<td>733 Plantation Estates Drive</td>
<td>NC</td>
<td>28105-9114</td>
</tr>
<tr>
<td>County</td>
<td>City</td>
<td>Name</td>
<td>Address</td>
<td>State</td>
<td>Zip Code</td>
</tr>
<tr>
<td>------------</td>
<td>----------</td>
<td>-------------------------------</td>
<td>------------------------------</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>Windsor Run Retirement Community</td>
<td>Pinehurst</td>
<td>Quail Haven Village</td>
<td>155 Blake Boulevard</td>
<td>NC</td>
<td>28374-</td>
</tr>
<tr>
<td></td>
<td>Southern Pines</td>
<td>Belle Meade and Pine Knoll</td>
<td>100 Gosman Drive, Suite B</td>
<td>NC</td>
<td>28387-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Penick Village</td>
<td>500 East Rhode Island Avenue</td>
<td>NC</td>
<td>28387-</td>
</tr>
<tr>
<td></td>
<td>New Hanover</td>
<td>Wilmington</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wilmington</td>
<td>Carol Woods at Autumn Hall</td>
<td>630 Carolina Bay Drive</td>
<td>NC</td>
<td>28403-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Plantation Village</td>
<td>1200 Porters Neck Road</td>
<td>NC</td>
<td>28411-7622</td>
</tr>
<tr>
<td></td>
<td>Orange</td>
<td>Chapel Hill</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chapel Hill</td>
<td>Carol Woods</td>
<td>750 Weaver Dairy Road</td>
<td>NC</td>
<td>27514-1438</td>
</tr>
<tr>
<td></td>
<td>Pitt</td>
<td>Greenville</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greenville</td>
<td>Cypress Glen Retirement Community</td>
<td>100 Hickory Street</td>
<td>NC</td>
<td>27858-1674</td>
</tr>
<tr>
<td></td>
<td>Polk</td>
<td>Columbus</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Columbus</td>
<td>Tryon Estates</td>
<td>617 Laurel Lake Drive</td>
<td>NC</td>
<td>28722-7420</td>
</tr>
<tr>
<td></td>
<td>Tryon</td>
<td>White Oak Village Apartments</td>
<td>70 Oak Street</td>
<td>NC</td>
<td>28782-1535</td>
</tr>
<tr>
<td></td>
<td>Robeson</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td>City</td>
<td>Name</td>
<td>Address</td>
<td>State</td>
<td>Zip Code</td>
</tr>
<tr>
<td>--------</td>
<td>--------------</td>
<td>-----------------------------</td>
<td>--------------------------</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>Lumberton</td>
<td></td>
<td>Wesley Pines Retirement Community</td>
<td>1000 Wesley Pines Road</td>
<td>NC</td>
<td>28358-2148</td>
</tr>
</tbody>
</table>

**Rowan**

Salisbury

| Trinity Oaks | 728 Klumac Road | NC | 28144-5714 |

**Scotland**

Laurinburg

| Scotia Village | 2200 Elm Avenue | NC | 28352-8035 |

**Wake**

Cary

| Glenaire | 4000 Glenaire Circle | NC | 27511-3884 |
| Searstone | 17001 Searstone Drive | NC | 27513-9978 |
| The Templeton of Cary | 215 Brightmore Drive | NC | 27511- |

Fuquay-Varina

| Windsor Point | 1221 Broad Street | NC | 27526-3602 |

Raleigh

| Springmoor Life Care Retirement Community | 1500 Sawmill Road | NC | 27615-4320 |
| The Cardinal at North Hills | 4030 Cardinal at North Hills Street | NC | 27609- |
| The Cypress of Raleigh | 8801 Cypress Lakes Drive | NC | 27615-2118 |
| The Oaks at Whitaker Glen | 501 East Whitaker Mill Road | NC | 27608- |
Seniors’ Health Insurance Information Program
North Carolina Department of Insurance
Mike Causey, Commissioner
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. We also help citizens recognize and prevent Medicare billing errors and possible fraud and abuse through our NC Senior Medicare Patrol (NCSMP) Program.

How does SHIIP work?
SHIIP provides education and assistance to North Carolinians in three ways:
• by operating a nationwide toll-free consumer information phone line Monday through Friday from 8 a.m. until 5 p.m.
• by training volunteers to counsel Medicare beneficiaries within their community about Medicare, Medicare Part D, Medicare supplements, Medicare Advantage and long-term care insurance, and
• by providing Medicare Supplement Premium Comparisons for consumers.

When was SHIIP established?
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. Numerous insurance companies sell Medicare supplements, 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 who are eligible for Medicare with an objective information service.

How do North Carolinians contact SHIIP?
You can contact SHIIP by dialing the nationwide toll-free consumer number, 855-408-1212, visiting the SHIIP Web site, www.ncshiip.com, or e-mailing ncshiip@ncdoi.gov. Trained SHIIP Volunteer Counselors are available in all 100 counties of North Carolina and are coordinated through an existing human service agency such as the Council on Aging, senior centers 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 or contact the Raleigh SHIIP office at the toll-free number shown below.

Can I get more information about SHIIP?
Yes! Contact SHIIP nationwide at 855-408-1212 or (919) 807-6900, 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.

SHIIP counselors are not licensed insurance agents, and they do not sell, endorse, or oppose any product, plan, or company. If you have questions about your specific plan, we encourage you to contact your insurance agent or the insurance company.
Continuing care.

Upon receipt of the complete application for a license in proper form, the Department shall, within 10 business days, issue

Hazardous financial condition.

Provider.

y the Department pursuant to rules

orporation, of an institution, building, residence, or

- 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-
North Carolina General Statutes (N.C.G.S.) Chapter 58

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.)

§ 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.)

North Carolina General Statutes (N.C.G.S.) Chapter 58

(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.

(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.
North Carolina General Statutes (N.C.G.S.) Chapter 58

(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 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.
North Carolina General Statutes (N.C.G.S.) Chapter 58

(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.)


(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 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 for determining when the individual will transition to receiving lodging and health-related services in the event of discharge by the provider or the resident.

(6) The policy for determining the refund of any portion of the entrance fee in the event of discharge by the provider or the resident.

(7) The description of the living quarters.

(8) Any property rights of the resident.

(9) Any requirement, if any, that the resident apply for Medicaid, public assistance, or any public benefit program.

(10) Any property rights of the resident.

(11) Any requirement, if any, to which the affiliate organization will be responsible for the financial and contractual obligations of the provider.

(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 seventy percent (70%), a provider shall only be required to maintain a twenty-five percent (25%) operating reserve upon approval of 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.)


(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.

North Carolina General Statutes (N.C.G.S.) Chapter 58

Appendix 6
North Carolina General Statutes (N.C.G.S.) Chapter 58

(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

(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, 58-2-185, 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.
(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
Appendix 6

North Carolina General Statutes (N.C.G.S.) Chapter 58

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.)
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.


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;
   (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.
Appendix 7

NORTH CAROLINA ADMINISTRATIVE CODE (N.C.A.C.)

(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.


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.


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.


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.
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.

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.

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.
Appendix 7

NORTH CAROLINA ADMINISTRATIVE CODE (N.C.A.C.)

Eff. April 1, 1993;

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;

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.

History Note: Authority G.S. 58-2-40; 58-64-25; 58-64-65;
Eff. April 1, 1993;

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;