



## PRIORITY LIST AGREEMENT

**PRIMARY APPLICANT'S NAME** \_\_\_\_\_

*(The primary applicant will be the only person contacted with offers.)*

Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone \_\_\_\_\_  preferred? Cell Phone \_\_\_\_\_  preferred?

One email address: \_\_\_\_\_

Date of Birth \_\_\_\_\_ Marital Status \_\_\_\_\_

Are you retired? \_\_\_\_\_ Current or former occupation \_\_\_\_\_

Interests, hobbies, community service: \_\_\_\_\_

**CO-APPLICANT'S NAME** \_\_\_\_\_

Cell Phone \_\_\_\_\_

One email address: \_\_\_\_\_

Date of Birth \_\_\_\_\_ Marital Status \_\_\_\_\_

Are you retired? \_\_\_\_\_ Current or former occupation \_\_\_\_\_

Interests, hobbies, community service: \_\_\_\_\_

**Please complete all pages, sign, include a \$1,300\* deposit and mail this form to:**

**Attn: Admissions Department  
Carol Woods Retirement Community  
750 Weaver Dairy Road, Chapel Hill, NC 27514**

*(Deposits are processed once a month. You will receive a confirmation letter in 1-4 weeks.)*

***\*The deposit will increase to \$1,500 for all Priority List Agreements received after 1/1/2023.***

The admissions requirements for residence at Carol Woods are nondiscriminatory with respect to race, creed, religion, gender, sexual orientation, and gender expression.



# CAROL WOODS PRIORITY LIST AGREEMENT

This Priority Agreement is made with the understanding that Admission to Carol Woods is not guaranteed at this time. This Agreement secures the option for you to go through the admissions process at a later date.

1. Upon entering into the Priority Agreement, you are asked to make a deposit of \$1,300.00, made payable to Carol Woods. This deposit is refundable, less a \$300 Administrative Fee, should you elect not to proceed. The Priority Deposit is non-interest bearing. Applicants will be considered for admission in the order of their priority deposits. The Priority Agreement does not establish the amount of the Entrance Fee.
2. At the time of formal admission to Carol Woods, applicants must be capable of living independently without reliance on support from any other individual. They must have a reasonable expectation of an active lifestyle of participation in the retirement community for three to five years.
3. When the decision to reserve a specific accommodation is made, the applicant will be asked to complete an Application for Admission packet that includes information on family, personal history, financial and health. Once Admissions has received the completed forms, the Admission Committee will review and, if appropriate, interviews will be scheduled with staff.
4. As part of the admission process Carol Woods may conduct a background check, including checking the online national sex offender registry.
5. After final review by the Admissions Committee, the applicant will be notified in writing of the decision of the Committee. The decision to admit or not to admit an applicant is made by Carol Woods in the exercise of its sole discretion. The applicant agrees to accept such decisions as binding and final in all respects.
6. At the time of formal acceptance to Carol Woods, you will be asked to make an Acceptance Deposit equal to 10% of the Entrance Fee for the residence you have selected. The balance of the Entrance Fee will be due within 90 days of the approval of the Admissions Committee or move-in, whichever occurs first. Your \$1,000 Priority List Deposit will be applied toward this amount.
7. You may terminate this Agreement for any reason prior to execution of the Residence and Services Agreement by giving written notice to Carol Woods. A refund of the Priority Deposit, less the \$300 Administrative Fee, will be made to you within 60 days of such notification.
8. The rights of applicants under this Agreement are personal to you and may not be transferred or assigned by you to heirs or personal representatives.
9. **It is your responsibility to keep us updated to changes in your address, telephone and email address. Notice of upcoming available homes are mostly made through email and sometimes telephone.**

**We will send you the most recent Disclosure Statement concurrent with receiving your \$1,300 deposit. Please indicate your preferred method of receiving the 200-page Disclosure Statement:**

- I have already received the Disclosure Statement.
- Email (Preferred method. Please provide email address): \_\_\_\_\_
- Mail

\_\_\_\_\_  
**Applicant's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Co-Applicant's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Director of Admissions & Public Relations**

\_\_\_\_\_  
**Date**

*(This will be signed by the director upon receipt.)*

Mark the accommodations you would like to be contacted about when we get to your name(s). Only mark the accommodations you will consider taking at this time. You can always make changes to your selections in the future if your needs change.

APARTMENTS		sq. ft.
	Studio (15 - number of homes)	507
	One Bedroom (65)	695
	or One Bedroom Small (7)	671
	or One Bedroom Large (3)	758
	Two Bedroom (35)	910
	Two Bedroom Large (3)	1,042
	or Two Bedroom Extra Large (6)	1,160
	Two Bedroom with Den (12)	1,292
	or Two Bedroom with Den Large (2)	1,345
	or Two Bedroom with Den Extra Large (1)	1,405

ORIGINAL COTTAGES (Historic District)		
	One Bedroom (14)	678
	One Bedroom with Den (22)	801
	or One Bedroom with Den & Carolina Room (4)	1,006
	Two Bedroom (18)	957
	or Two Bedroom with Carolina Room (7)	1,149
	Two Bedroom with Den (12)	1,078
	or Two Bedroom with Den & Carolina Room (12)	1,280

DUPLEX COTTAGES (Lower, Middle, Upper Loops)		
	One Bedroom with Den Duplex (16)	1,343
	Two Bedroom with Den Duplex (34)	1,538
	Two Bedroom w/ Den & Sunroom Duplex (12)	1,855
<i>Some cottages have sunrooms that add 60-240 sq. ft. Some smaller cottages could also have a half bath added.</i>		

TOWNHOMES (Coventry)		
	Townhome (14)	1,097-1,894

EARLY ACCEPTANCE		
	Carol Woods' off-campus program	n/a

Please list a person we might contact if we are unable to reach you:  
 Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_ Telephone \_\_\_\_\_

Please list name(s), address and telephone number of your children, if any:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Important!**  
 Please check one of the boxes below so we know when to start contacting you:

I will be ready to move in the year \_\_\_\_\_.

or

I will contact Carol Woods when I am ready to move.

Comments about accommodations:

How do you know about Carol Woods?

## Explanation of the Carol Woods Priority List

Joining the Priority List is the first step toward possible future residency at Carol Woods. The formal admission process takes place at the time a specific apartment or cottage is reserved.

When you join the Carol Woods Priority List, you may put your name on multiple lists for different accommodations. There is an overall Priority List as well as separate lists for each type of accommodation, and Priority List members can make changes to the types of accommodations they prefer.

The Priority List assures that, when vacancies occurs, people on specific lists are contacted in the order deposits were received. The reasons you won't be contacted are if: (1) you are not age eligible; (2) you have said *you* will call at the point in time when you are interested in receiving offers; (3) you have indicated that you want to start receiving calls at a later date or; (4) you have indicated preferences that restrict your choices, such as only wanting calls for ground floor apartments.

You may move between lists if you decide by choice or circumstance that you prefer a different type of accommodation. Your name is inserted on the new list in the order of your original deposit. This frequently happens when a spouse dies and the surviving person wants a smaller accommodation.

There is never a penalty for declining an offer. If you decline, your name remains in the same place on the list(s), and we contact the next person. If you say that you have no interest in moving, we ask if you want us to continue contacting you or if you prefer to call us when you are closer to being ready to move.

It is impossible to foresee when accommodations will become available because of the many unpredictable factors involved. Any estimate of waiting time can only be a guess based on the number of people on the Priority List and past experience. Some situations that affect the waiting period are:

- 1) The inability to predict when a unit will be vacated by a current resident;
- 2) The inability to predict when people ahead of you who were not ready to move in the past will activate their place on the list;
- 3) The inability to predict when people ahead of you make changes to the types of accommodations they prefer;
- 4) The inability to predict how many people ahead of you will decline an offer;
- 5) The inability to predict how many residents will make internal transfers as their needs change; internal needs-based transfers are always given priority.

The assurance we give you is that we will always call in the order deposits were received and work with you toward finding the right place at the right time for your move to Carol Woods.

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### Please let us know if you have seen any of our sponsorships or advertisements

- |                                                                              |                                                                                                         |
|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Alpha Kappa Alpha (Mu Omicron Omega chapter) events | <input type="checkbox"/> University/Community MLK Memorial Banquet                                      |
| <input type="checkbox"/> Carolina Theatre performances                       | <input type="checkbox"/> University of North Carolina at Chapel Hill Golden Ram Induction Ceremony      |
| <input type="checkbox"/> Carolina Alumni Review                              | <input type="checkbox"/> University of North Carolina at Chapel Hill Retired Faculty Appreciation event |
| <input type="checkbox"/> Chapel Hill-Carrboro NAACP Freedom Fund Banquet     | <input type="checkbox"/> UNC-TV/PBS                                                                     |
| <input type="checkbox"/> Indy Week Newspaper                                 | <input type="checkbox"/> Washington Post Magazine                                                       |
| <input type="checkbox"/> Justice Theater Project/Black Nativity              | <input type="checkbox"/> Other _____                                                                    |
| <input type="checkbox"/> North Carolina Gay & Lesbian Film Festival          | <input type="checkbox"/> None                                                                           |
| <input type="checkbox"/> North Carolina Symphony Orchestra                   |                                                                                                         |
| <input type="checkbox"/> PlayMakers Repertory Company                        |                                                                                                         |
| <input type="checkbox"/> Triangle Expo for LGBTQ Aging Adults                |                                                                                                         |