



PRIORITY LIST AGREEMENT

Thank you for your interest in becoming a part of Carol Woods. Everyone in our community plays a compassionate and supportive role as we work together to create an environment of inclusion and belonging. We are a dementia-inclusive community, without a separate memory care unit, and are committed to living well together.

PRIMARY APPLICANT'S NAME _____

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

Address _____ City _____

State _____ ZIP code _____

Home phone _____ preferred? Cell phone _____

preferred?

One email address: _____

Date of birth _____ Marital status _____

Current or former occupation _____

Community service/volunteerism, interests, hobbies: _____

CO-APPLICANT'S NAME _____

Cell phone _____

One email address: _____

Date of birth _____ Marital status _____

Current or former occupation _____

Community service/volunteerism, interests, hobbies: _____

Please complete all pages, sign, include a \$1,500 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 one to four weeks.)

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 \$1,500.00, made payable to Carol Woods. This deposit is refundable, less a \$500 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 physically and cognitively capable of living independently without reliance on support from others. 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, finances 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 \$500 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 \$1,500 deposit. You do not need to confirm receipt of this document. Please indicate your preferred method of receiving the 200-page Disclosure Statement:

- I have already received the Disclosure Statement.
- Email (This is our preferred method of contact.): _____
- Mail (Check here to receive a hard copy.)

Applicant's Signature

Date

Co-Applicant's Signature

Date

Director of Admissions & Public Relations

Date

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

We group floor plans that are similar. For example, we have three sizes of one-bedroom apartments that all fall under the one-bedroom list, and we will contact you if we get to your name for any of those three one-bedroom sizes. The blocking to the left of the floor plan types indicates how we group similar floor plans.

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.

Notes about accommodation preferences:

How do you know about Carol Woods?

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 with Den & Sunroom Duplex (12)	1,855

Some cottages have sunrooms that add 60-240 sq. ft. You will be contacted for homes with and without a sunroom.

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:

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 when 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 in which deposits were received. Even if you are the next person on the relevant list, you will not be contacted about an available residence if one of the following exceptions applies: (1) You are not age eligible for residency; (2) you have said *you* will contact Carol Woods at the point in time when you are interested in receiving offers; (3) you have indicated that you want to be contacted at a later date; or (4) you have indicated accommodation preferences that restrict your choices (such as only wanting to be contacted for ground-floor apartments). If you are not offered a newly available residence for one of the above reasons, you will retain your position on the Priority List and will be contacted when the first residence for which you are eligible becomes available.

You may move between lists if you decide by choice or circumstance that you now prefer a different type of accommodation. In this event, your name will be 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 no 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 that you contact 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 currently on the Priority List, and on our 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 decline an offer;
- 4) The inability to predict when people ahead of you make changes to the types of accommodations they prefer; and
- 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 is that we will always contact Priority List members in the order in which deposits were received.

Priority List Volunteer Program

Carol Wood is a community of volunteers where residents help one another. We have a program where that spirit of volunteerism extends to members of the Priority List. Our Priority List Volunteer Program is a way Priority List members can share time and friendship with our Carol Woods residents living in our higher levels of support. Together, we can help enrich the lives of residents who have physical, cognitive, and/or social challenges, and help keep them connected with the Carol Woods community at large.

If you are interested in learning more about our Priority List Volunteer Program, reach out to Life Enrichment Specialist and Volunteer Coordinator Devon Wilson at dwilson@carolwoods.org or 919-918-2602.