

Move In Checklist & Timeline

For: _____ Your New Address: _____

Hendersonville, NC 28792

FIRST THINGS FIRST

1) Tour Carolina Village & Join Our Waiting List

- Schedule your tour with Cheryl or Nora.
- Sign and return Waiting List Agreement, along with your non-refundable \$1,000 deposit. This deposit will be applied to your entrance fee upon move-in.
- Return your annual survey each year, even if you are not ready to move.

1-2 YEARS BEFORE MOVE IN *(Approximately)*

2) Complete Annual Survey & Select Home Types

- Submit your annual survey, indicating your active wait list status and preferred unit selections. We will contact you with availability based on this information.

3-6 MONTHS BEFORE MOVE IN *(Approximately)*

3) Review Your Home Offer

- Schedule your pre-residency meeting with us.

4) Complete Pre-Residency Paperwork

- Return Financial Report & Supporting Documentation
- Return Disclosure and Release Form
- Return Smoking Policy
- Return Pet Policy / Pet Interview *(If applicable)*

5) Schedule Physical Exam

- Schedule a medical evaluation with your physician. Ask him or her to complete the Medical Report and to return it to Carolina Village via secure email or fax (828-693-8285).

6) Receive Acceptance Letter - *Your approximate move-in schedule will be included. Monthly service fee will begin 90 days after acceptance or upon move-in, whichever occurs first.*

- Submit \$10,000 deposit. This and your \$1,000 wait list fee apply to your entrance fee.

90 DAYS BEFORE MOVE IN *(Approximately)*

7) Decide On Your Home Customizations

- Fill out Selections Form with Cheryl or Nora.
- Meet with us to review renovation expectations and customization costs, as well as downsizing, packing, and moving assistance service recommendations.

8) Place Your Current Home For Sale - *Most residents choose to sell their current home before moving to Carolina Village. In that event, you have 12 months to sell your home before the second 50% of your entrance fee is due. (See item 14 below for more details.)*

****CONTINUED ON REVERSE****

60 DAYS BEFORE MOVE IN *(Approximately)*

9) Submit New Resident Documentation Packet

Complete and return these documents:

- Resident Personal Information
- Private Health Information Release
- Shared Resident Biography
- Image Release
- Power of Attorney (Effective and Durable)
- Advanced Medical Directive or Living Will
- Copy of Social Security Card
- Copies of Medicare, Medical Insurance, and/or Supplemental Cards
- Copies of Valid Driver's License, Vehicle Registration, and Proof of Vehicle Insurance

10) Set Move In Date/Finalize Home Sale Details

Stay in communication with us throughout this process.

11) Schedule New Resident Orientation

30 DAYS BEFORE MOVE IN *(Approximately)*

12) Purchase Renter's Insurance *(Optional)*

13) Review Utility Options

Meet with us to review:

- Internet Services
- Telephone Services
- Television Services

5-7 DAYS BEFORE MOVE IN *(Approximately)*

14) Sign Occupancy Agreement & Installment Agreement At Closing

Submit the first 50% of your entrance fee. The remaining 50% is due no later than 12 months after the final notice that your Carolina Village residence is ready for move in OR when your current home sale closes, whichever occurs first.

15) Walk Through Your New Home

Receive your keys, pendant, and name badge.

16) Monthly Maintenance Fee Begins Upon Move-In

Our Business Office will invoice your first monthly maintenance fee on a prorated basis based on your occupancy date. Contact the Business Office with billing questions going forward.

Submit the remainder of your entrance fee. (See item 14 above for more details.)

MOVING DAY! Date: _____



Cheryl Justus

Director of Marketing
828-233-0602
cheryl@carolinavillage.com

Nora Stepp

Marketing Specialist
828-233-0646
nstepp@carolinavillage.com