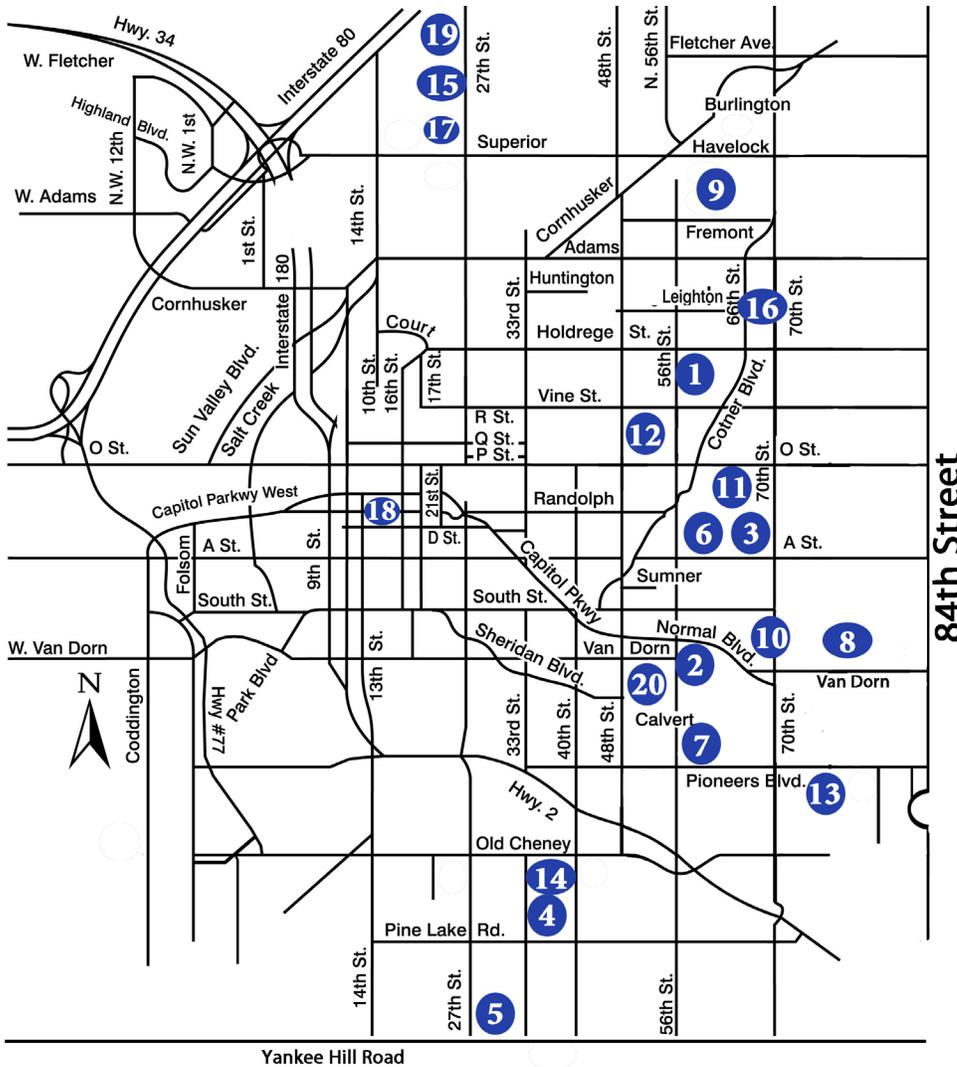




A Pioneering Area Agency on Aging

Independent Senior Living Communities



- * - Apartments without services
- 🌸 - Apartments with services: housekeeping, laundry, meals
- ★ - Assisted living capabilities
- ▼ - Building with buy-in arrangement
- ✕ - Condominiums for purchase, some for rent

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Mary Buford Wilson, Elder Law Attorney, suggests that you review the following when signing contracts for retirement housing. 12

1 - Chateau Gardens

825 N. Cotner Blvd.

Lincoln, NE 68505

402-464-8351

chateaudev.com

Number of units: 95

Age Limit: 55+

Description: Chateau Gardens is located on the corner of Cotner Boulevard and Vine Street in northeast Lincoln. This three-story independent living community is owned and managed by Chateau Development LLC. Choose from one- and two-bedroom apartment homes for rent, ranging in size from 600 to 1,040 square feet.

Monthly Fee: Monthly rent starts at \$575 to \$785, depending on the apartment size/style.

Accepts Section-8 vouchers.

All interior and exterior maintenance is provided by Chateau, including lawn care and snow removal. Water and trash collection services are included in rent as well. Cable TV available at a discounted rate of \$34 per month.

Pets Allowed: Yes, small dogs on first floor only

Deposit: \$175 - non-refundable

Meals Provided: No

Garages: Yes, \$55 per month

Storage: Yes

Emergency Call System: No

Additional Information: These apartment homes were designed with energy-efficient heat pumps, support bars in showers and bath areas, door levers instead of doorknobs. Some apartments are available with washer/dryers. Each floor has a common laundry room. The building includes elevators, interior mailboxes and a controlled access entry system. It is located near physicians offices, shopping, bus lines and the City of Lincoln's Mo-Pac recreation trail.

2 - Chatelaine Residences

6201 Normal Blvd.

Lincoln, NE 68506

402-486-4165

kruegerdevelopment.com

Number of Units: 80

Age Limit: 55+

Description: The Chatelaine Residences are a three-story independent living complex located within walking distance of Holmes Lake. There are one, two, and three bedroom apartments for rent ranging in size from 975 to 1,900 square feet. A security deposit and one year lease are required.

Monthly Fee: Monthly rent for a one-bedroom ranges from \$874 to \$991; a two-bedroom ranges from \$938 to \$1,063. All interior and exterior maintenance is provided by Chatelaine Residences, including appliances (except tenant owned washer/dryers), lawn care, snow removal, mechanical systems, trash collection, water, and pest control. Basic cable TV is furnished for a \$34 monthly charge. Each tenant is responsible for their own electricity and telephone service.

Pets Allowed: Yes, small dog or cat

Meals Provided: No

Garages: Yes, underground secured parking

Storage: Yes, 4 ft. x 8 ft. (\$12/month)

Emergency Call System: No

Additional Information: All apartments are furnished with ceramic tile entry and kitchen floors, carpeting, full-size Whirlpool kitchen appliances, and full bathrooms with washer/dryer hook-ups. A common area is available where you can get together with fellow residents, as well as a library, "Great" room available for family occasions, and guest apartment which can be rented for a fee. The building includes elevators, interior mailboxes, and a controlled access entry system.

3- Brentwood Estates

1111 S. 70 Street
Lincoln, NE 68510
402-489-1112
brentwood-estates.com
Number of units: 103
Age limit: Retired or disabled people any age

Description: Brentwood Estates offers studios, one bedroom, and two bedroom apartments. Several floor plans are available. All apartments are rented, with no lease or buy-in charges. A \$100 refundable deposit will place you on the waiting list.

Kitchenettes are located in apartments. Resident managers are available 24 hours daily. Many activities are offered, including those for residents' families. Grandchildren are welcome to visit.

Monthly Fee: The monthly fee for a studio apartment ranges from \$1,675 to \$1,910; one-bedroom from \$2,150; and two-bedrooms from \$2,930. For a second person in any apartment, an additional \$500/month will be charged. The monthly fee includes meals, utilities, weekly housekeeping, linen service, toilet tissue, soap, scheduled activities, local transportation, cable TV and all maintenance/repairs to the apartments. Ask about Holiday Travel Program.

Pets Allowed: Yes, small dog or cat

Meals Provided: Three meals served daily

Garages: Yes, a limited number at \$45 per mo.

Storage: First come basis

Emergency Call System: Yes

Additional Information: There are many common areas, including a TV lounge, craft room, pool table, lighted outdoor exercise path, library, and fireside lounge. Exercise classes, blood pressure screening, and health seminars are offered. Church services available. Personal assistance is available privately through home health care. A beauty/barber shop is available.

4- Savannah Pines at Williamsburg Village

3900 Pine Lake Road
Lincoln, NE 68516
402-420-9900
rlcommunities.com/locations/savannah-pines
Number of Units: 119
Age Limit: 55+

Description: Savannah Pines is an independent retirement community. There are no buy-in fees, entrance fees or leases at Savannah Pines. There is on-site Home Health Care providing personal assistance, extended care and physical therapy available through private home health care. A fully refundable \$500 deposit will place you on a waiting list if your desired apartment is not available.

Monthly Fee: The monthly fee depends on spacious two-bedroom or two-bedroom/two-bath apartment sizes and location. Apartments range from \$2,925 to \$4,625 a month. The second person fee is \$485. Monthly fee includes three all chef-prepared meals daily, chef's pantry available 24/7, room service, full size kitchen, 24-hour staffing, transportation, weekly housekeeping, cable, utilities (except telephone), free laundry facilities (W/D hook-ups in every apartment), 150 seat theatre, 24/7 fitness center with Whirl Pool spa, supervised exercise classes, walking club and blood pressure screens.

Pets Allowed: Yes

Meals Provided: All chef prepared meals daily.

Garages: \$80 per month

Storage: \$45 per month

Emergency Call System: Yes

Additional Information: Families welcome. Savannah Pines offers complimentary activities for visitors. Residents enjoy many other amenities including free travel program, access to guest suite for out of town guests, beauty shop, Stockwell Pharmacy & Gift shop, City Bank, Via Van Bloom Travel Agency, library, walking trail and party room with resident reservation.

5 - Clark Jeary Retirement Community

8401 S. 33 Street
Lincoln, NE 68516
402-489-0331
clarkjeary.com

Number of units: Independent living - 50
Assisted living - 62

Age limit: Retired

Description: Clark Jeary is a retirement community of independent and assisted living apartments operated by the Nebraska Presbyterian Welfare Foundation, Inc. One- and two-bedroom apartments are all on one level with patios and enclosed courtyards. Housekeeping and laundry are provided twice a week or every other week. Two meals included in monthly fee for independent living residents. Three meals included in monthly fee for Assisted Living Residents. Additional meals available at an additional cost. Some transportation is provided. Beauty and barber shops available.

Monthly Fees: There are two payment options. One and two bedrooms sizes available, monthly rate varies on size of apartments:

One bedroom: Option A \$2,265
Option B/C \$2,480

Two Bedroom: Option A \$2,800
Option B/C -\$3,020

Second Occupant is additional \$410 month

Pets Allowed: No

Meals Provided: See above

Garages: For a fee

Storage: Yes

Emergency Call System: Yes

6 - Gramercy Hill

6800 "A" Street
Lincoln, NE 68510
402-483-1010
gramercyhill.com
Number of units: 146
Age limit: 55+

Description: Gramercy Hill is a full-service, rental retirement community offering both independent and assisted living services. The complex has eight floor plans ranging from efficiencies to two-bedroom/two-bath apartments. Apartments are equipped with kitchenettes, safety features, and large walk-in closets. Laundry rooms are available on each floor. For residents who may need special assistance to remain independent, assisted living services are available. This includes assistance with bathing, dressing, medication, and weekly flat laundry services.

Monthly Fee: The monthly fee depends upon the size of the apartment. Independent living apartments range from \$1,860 to \$2,820 per month. Assisted living apartments range from \$2,680 to \$3,245. Monthly rent includes daily meals, housekeeping, scheduled transportation, maintenance, cable TV, all utilities (except phone), full-time social and recreational programming and 24-hour staffing.

Pets Allowed: Yes, small dog or cat

Garages: \$40 per month

Storage: Yes, \$9-\$12 per month additional fee

Emergency Call System: Yes

Additional Information: The staff at Gramercy Hill make every effort to provide for residents' needs. A beauty and barber shop is available. Transportation is provided for a fee, and common areas include exercise, big screen TV, and library.

7 - The Legacy

5600 Pioneers Blvd.

Lincoln, NE 68506

402-436-3000

legacyretirement.com

**Number of Units: Independent Living - 135
Assisted Living - 38**

Age limit: 55+

Description: These are one and two bedroom rental apartments; only a lease and security deposit required. Assisted living units are also available with three meals a day, bathing, dressing and medication supervision. "Legacy care," provides some services in independent apartments, for an additional fee.

Monthly Fee: The monthly fee ranges from \$2,350 to \$4,195 An additional charge of \$11 per day is required for a second occupant. This fee includes two meals daily, all utilities (except phone), cable TV and weekly housekeeping, scheduled transportation and activities. All interior and exterior maintenance is provided by the Legacy, including appliance, lawn care, snow removal, mechanical systems and trash collection.

Pets Allowed: Yes, small dog or cat

Meals Provided: Continental breakfast and evening meal are provided. Lunch available for an additional fee.

Garages: \$45 per month; underground parking is \$55 per month

Storage: Yes, 4 ft. x 4 ft., \$10 per month

Emergency Call System: Yes

Additional Information: The Legacy has a variety of common areas, including a lounge, library, fireside room, fitness center, sunroom, terrace and "Main Street." Main Street offers a general store, bank, ice cream parlor and beauty/barber shop. The Legacy offers residents a full service health and housing program. There are four computers available to residents and training for e-mail and the Internet.

8 - The Legacy Estates

7200 Van Dorn

Lincoln, NE 68506

402-484-8888

legacyretirement.com

**Number of Units: Independent Living - 163
Assisted Living - 40**

Age Limit: 55+

Description: These are one -and two-bedroom apartments ranging from 675 to 1,454 square feet, some with fireplaces and oak floors. These apartments are rental units. Lease and security deposit is required. Assisted living units include 24-hour licensed nursing staff as well as bathing, dressing, and medication supervision.

Monthly Fee: The monthly fee ranges from \$1,795 for a studio to \$4,475 for a large two-bedroom unit. An additional charge of \$11 per day is required for a second occupant. This fee includes two meals daily, all utilities (except phone), basic cable TV and weekly housekeeping and activities. All interior and exterior maintenance is provided, including appliance, lawn care, snow removal and trash collection.

Pets Allowed: Yes, small dog or cat, owner responsible for care.

Meals Provided: Continental breakfast and evening meal are provided. Lunch is available for additional fee.

Garages: Underground, heated parking for \$55 per month.

Storage: Yes

Emergency Call System: Yes

Additional Information: At the Legacy Estates, there are a variety of common areas available such as Main Street shops that include a drug store, bank, beauty and barber shop, and an ice cream parlor. There is an English Pub, courtyard, miniature golf course, fitness center, theater and fireside room.

9 - The Legacy Terrace

5700 Fremont Street

Lincoln, NE 68507

402-464-5700

legacyretirement.com

Number of Units: Independent Living - 143

Assisted Living - 56

Age Limit: 55+

Description: These are one- and two-bedroom rental apartments ranging from 625 to 1,458 square feet. Only lease and security deposits are required. There are assisted living apartments for those needing assistance with life's daily living tasks.

Monthly Fee: The monthly fee ranges from \$1,795 - \$3,495. An additional charge of \$11 per day is required for a second occupant. This fee includes two meals daily, all utilities (except phone), basic cable TV, and weekly housekeeping, facility transportation and activities. All interior and exterior maintenance is provided by Legacy Terrace, including appliance, lawn care, snow removal, and trash collection.

Pets Allowed: Yes, small dog or cat, owner responsible for care.

Meals Provided: Continental breakfast

Garages: Yes, for \$45 per month.

Storage: No

Emergency Call System: Yes

Additional Information: Common areas include a lounge, library, courtyard, "Main Street" with ice cream parlor, bank, Four Star Drug, beauty and barber shop, and fitness center.

10 - Carriage Glen

7005 Shamrock Road

Lincoln, NE 68506

402-484-5113

carriageglenoflincoln.com

Number of units: 51

Age limit: 62+

Description: Carriage Glen is an independent senior living community. It is a non-profit corporation, run by a Board of Directors partially comprised of Carriage Glen residents. Units range in size from 703 to 1,542 square feet. Each features an eat-in kitchen with full-size appliances and pantry.

Entrance Fees: Entrance fee of \$33,340 to \$114,120 (based on square footage) is a one time payment and is fully refundable upon transfer of unit to another qualified resident.

Monthly Fee: The monthly charge is based on the cost of operating the facility and providing basic services to the residents. It ranges from \$682 to \$1,515 depending on unit size. The basic service package includes: use of van transportation, wellness program, social activities, home theater, workshop, country store, library, and other community areas, trash collection, snow removal, lawn care, utilities in the common areas, and maintenance. Residents pay own utilities.

Pets Allowed: No

Meals Provided: Optional dining program for an additional fee.

Garage: Underground parking for \$38 per month.

Storage: Yes

Emergency Call System: Yes

Tax Information: Property taxes are figured in the monthly fee.

Additional Information: Residents pay for their electricity, phone, cable TV and personal contents insurance. The fitness room and wellness program are provided by Madonna Rehabilitation Hospital.

11 - Eastmont Towers

6315 "O" Street
Lincoln, NE 68510
402-489-6591
eastmonttowers.com
Number of units: 155
Age limit: 62+

Description: Eastmont Towers is a continuing care retirement community. Continual care offers independent living, assisted living or skilled nursing care all on the same campus.

Life Care options offers financial strategies with a guarantee that if your health needs change you won't have to move.

Life Care Fee: Life Care fees are assessed according to the square footage and amenities of each apartment. The Life Care fee ranges from \$45,000 to \$150,000. A second person pays an additional Life Care fee.

Monthly Fee: Petite studio \$1,694, one bedroom \$1,803 and \$2,705 for two bedroom unit. Double occupancy has additional charge.

Pets Allowed: No

Meals Provided: Yes

Garages: Yes, \$50 per month

Storage: Yes

Emergency Call System: Yes

12 - Gateway Vista

225 N. 56 Street
Lincoln, NE 68504
402-464-6371
gatewayseiorliving.com
Number of units: 57
Age Limit: 55+

Description: Gateway Senior Living has a choice for retirement living including independent and assisted living units, as well as duplexes. Gateway Senior Living also has an 18 bed, skilled nursing care center.

Entrance Fee: Each person in the apartment requires a non refundable entrance fee of \$2,000 due at time of reservation.

Monthly Fee: For a standard one-bedroom apartment which includes utilities, cable TV, telephone, weekly housekeeping, continental breakfast and dinner, flat laundry and maintenance, the fee is \$3,315. Larger apartments cost more depending on square footage. Assisted living service is available to residents in their apartments for additional fees. Skilled nursing care available for an additional fee administered through the health center. Second occupant charged \$650 month.

Pets Allowed: Yes, small dog or cat with approval and \$1,000 deposit.

Meals Provided Independent: Continental Breakfast & Dinner

Assisted Living and Skilled Nursing care: Three Meals included in monthly fee.

Garage: Yes, available for \$30

Storage: Yes, available for \$15

Transportation (non-scheduled) for a fee: Yes

Beauty & Barber shop available: Yes

Emergency Call System: Yes

13 - Grand Lodge at the Preserve

4400 S. 80 Street
Lincoln, NE 68516
402-489-8003
grandlodgeatthepreserve.com

Number of units: Independent living - 111
Assisted Living - 8

Age limit: 55+

Description: Grand lodge is designed for individuals 55 years and older with middle to upper income who desire independent living with access to additional levels of care if needed. Residents enjoy priority access to assisted living located on-site and nursing care which is available at Madonna rehabilitation Hospital.

Independent living residences have full size kitchens, patios, or terraces, one, two, or three bedrooms and one or two bathrooms. Size of the residences range from 675 to over 1,800 square feet.

Entrance Fee: Includes a one time entrance fee and/or supplemental fee that will be returned upon transfer of the residence to another qualified resident. Entrance fees and supplemental fees start at \$68,580.

Monthly Fee: Starts at \$1,863, based on size of unit and number of occupants. Second occupant charge is \$520 per month.

Pets Allowed: Birds, cats and small dogs

Meals Provided: Evening meal and Monday - Friday continental breakfast in Independent living, three meals daily for Assisted Living.

Garages: Underground parking included.

Storage: Additional storage included

Emergency Call System: Wireless included

Additional Information: Scheduled transportation, wellness services, woodworking shop, computer room, library, game room, beauty and barber shop.

14 - The Landing at Williamsburg Village

3500 Faulkner Drive
Lincoln, NE 68516
402-420-9355
www.immanuel seniorliving.com

Number of Units: Independent Living - 90
Assisted Living - 44

Age Limit: 60 and older

Description: The Landing at Williamsburg Village was developed by Immanuel Retirement Communities in sponsorship with Tabitha Health Care Services and affiliated with the Nebraska Synod, Evangelical Lutheran Church of America. Offering both independent and assisted living apartments, there are one- to three-bedroom apartments available.

Entrance Fee: Cost increases according to size of unit and number of occupants beginning at \$75,000 and up.

Monthly Fee: Start at \$2,599 and increase with size of unit and number of residents. Assisted living apartments start at \$3,870 includes three meals per day and weekly housekeeping.

Pets Allowed: Yes, two pet wings on the ground floor to accommodate residents with small pets.

Meals Provided: A continental breakfast is served daily. Receive 30 additional meals per month all included in the monthly fee. Choose from lunch or dinner. Additional meals are available for a fee.

Garages: Yes

Storage: Yes

Emergency Call System: Yes

Additional Information: Amenities include an exercise center and heated pool with staff, library, computer room, common areas and beauty and barber shop.

Senior Residences Accessed by Realtors

15 - Autumn Wood

27th & Folkways Blvd. to 27th

& Enterprise Drive

Lincoln, NE 68521

Number of Units: 351

Age Limit: 55 years

For information contact: Albers Company
at 402-434-0292

Description: Autumn Wood is a retirement community located approximately one mile north of Superior Street on 27th Street. The 145-acre development has single-family homes, townhouses, duplexes, condominiums, and the Walter subsidized housing complex. The condominiums are located in the Enterprise building. All of the units, except for those at the Walter, are individually owned and may be sold or rented as the owner desires.

Monthly Fee: Residents are charged a monthly fee of \$53, covering lawn care and snow removal and \$12.50 for refuse. Residents who have detached garages are charged an additional \$2/month to cover electricity. All utilities are the responsibility of the homeowner.

Pets Allowed: Yes

Meals Provided: No

Garages: Yes

Storage: No

Emergency Call System: No

Tax Information: Homeowner pays property taxes

Additional Information: Autumn Wood has many amenities available to residents, including a community center, walking paths, a small pond, basketball hoop.

16 - Cotner Center Condominium

1540 N. Cotner Blvd.

Lincoln, NE 68505

402-466-2509

www.cotnercentercondos.com

Number of units: 101 Condominiums

Age Limit: 55+

Description: Individuals purchase these condominiums and are full owners of their units, plus they own a percentage interest in the common areas. One- and two-bedroom units usually sell for \$35,000 to \$65,000, and vary in square footage.

Monthly Fee: The monthly association dues cover cable TV, water, sewer, trash and recycling collection, insurance and maintenance of common areas, salaries for the staff, lawn care and snow removal. The dues are \$155 for a one-bedroom unit, \$157 for a two-bedroom unit, and \$18 for each additional person.

Pets Allowed: Fish and small birds only.

Meals Provided: Optional, two meals per week are offered for \$7 each.

Garages: Yes, \$40 per month.

Storage: Yes

Emergency Call System: No

Tax Information: Homeowner pays property taxes.

Additional Information: Homeowners pay for their electricity, homeowner's insurance and phone. They are able to sell their units, and the Center will assist with resale if requested. Cotner Center is located near businesses, a public library, and shopping center. A craft room, pool room and exercise room, a library, a large dining room, meeting rooms, motel rooms and an auditorium are available to all co-owners. Housekeeping is not provided by staff, although many residents hire these services privately.

Senior Residences Accessed by Realtors *continued*

17 - North Gate Garden Estates

2425 Folkways Blvd.

Lincoln, NE 68521

402-476-7385

www.northgateliving.com

Number of units: Condominiums - 101
Town homes - 52

Age limit: 55+

Description: North Gate Garden Estates is an independent senior living community comprised of condominiums and townhouses that are individually owned. One and two-bedroom condominiums are 693 to 1,187 square feet, town homes are 1,160 to 1,200 square feet. All town homes have two bedrooms and two bathrooms. When units become available they will be sold by individual owners through Realtors.

Monthly Fee: The monthly fee for condominium owners is \$160 with \$15 charged for an additional person. This fee includes cable TV, water and sewer, garbage, maintenance of common areas, salaries and staff expenses, lawn care, use of activity center, snow removal and wellness program, i.e. blood pressure checks, which are provided by Saint Elizabeth Home Care Services. The monthly fee for townhome owners is \$150 or \$160. This fee covers similar expenses to condominium owners, except town home owners pay for water usage.

Pets Allowed: Condominiums, cats only;
Townhomes limited-small dogs & cats

Meals Provided: Three meals per week are offered in the dining area.

Garages: Yes, condominiums receive indoor parking with bill of sale; townhomes have attached garages and retain ownership.

Storage: Yes

Emergency call system: No

Taxes: Homeowner pays taxes

18 - Pioneer House

1130 "H" St., Lincoln, NE 68508

402-441-5800

NAI FMA Realty

Number of units: Condominiums - 52

Age limit: 55+

Description: Residents purchase an interest in Pioneer Housing Corporation. There are various floor plans, starting with efficiency units, and including two bedroom/two bathroom units. Units sell from \$12,000 to \$40,000 according to size.

Monthly Fee: The monthly fees are set according to size and covers utilities, cable TV and maintenance.

Pets Allowed: No

Meals Provided: No

Parking Space: For a fee

Storage: Yes

Emergency Call System: No

Tax Information: If not eligible for Homestead Tax Exemption, it will be added to monthly fee

Additional Information: The common areas include library, lounge, party room, and a family room where guests can stay for only \$10/night. Pioneer House is within walking distance to churches, grocery store and the downtown area. Phone service is paid by the resident. Laundry facilities are available.

Senior Residences

Accessed by Realtors *continued*

19 - Stonecliff Estates

5831 Enterprise Drive

Lincoln, NE 68521

Home Real Estate - Kathy Finely

402-430-0751

Number of Units: Condominiums - 46

Age Limit: 55

Description: Stonecliff Estates is a new development of condominiums and rental apartments. Several floor plans are available and residents will have access to Autumn Wood amenities as well as common activity areas.

Purchase Price: Ranges from \$91,900 to \$149,900 depending on size of unit and vary from 787 - 1387 square feet.

Monthly Fee: Commons fees start at \$91 per month and increase with size of unit. Fees include trash collection, water service, lawn care and snow removal and cable TV.

Rental Costs: \$900 to \$1,200 per month according to size of unit.

Pets Allowed: Yes

Meals Provided: No

Garage: Each unit has underground space.

Storage: Each unit has underground storage.

Emergency Call System: No

Tax Information: Homeowner pays property taxes.

Additional Information: Stonecliff Estates offers a secure entry, exercise room, and activity lounge. Apartments have appliances and fireplaces. Underground parking and storage are included with each unit.

20 - Van Dorn Villa

3001 S. 51 Street

Lincoln, NE 68506

402-489-3001

<http://vandornvilla.com/>

Number of units: Condominiums - 191

Age limit: 55+

Description: Van Dorn Villa is located near 48th and Van Dorn Streets in southeast Lincoln. Residents purchase condominiums and are full owners of their units, plus they own a percentage interest in common areas. One-bedroom/one-bathroom units usually sell for \$60-\$80,000 and vary from 660 to 792 square feet. Two-bedroom\one-bathroom units sell for \$75,000 to \$95,000 and are 935 square feet. Two-bedroom\two-bathroom units sell from \$100,000 up to \$130,000 and are 1,067 to 1,300 square feet.

Monthly Fee: Monthly fees are \$180 for an individual and \$195 for a couple. This charge covers cable TV, water, trash collection, maintenance of common areas, lawn care, snow removal and salaries for the staff.

Pets Allowed: No

Meals Provided: Two evening meals and a Sunday buffet are offered for fee.

Garages: Yes, if available with unit

Storage: Yes

Emergency Call System: Yes

Tax Information: Homeowner pays property taxes.

Additional Information: Homeowners pay for their electricity, telephone, and homeowner's insurance. They are able to resell their units, and the Villa will assist with resale if requested. A library, beauty shop, exercise room, and craft rooms are available to the residents. Housekeeping is not provided by the staff, although many residents hire these services privately.

Mary Buford Wilson, Elder Law Attorney, suggests that you review the following when signing contracts for retirement housing:

- 1) Review the contract carefully. If possible, have it reviewed by an attorney. (Even if you think you understand the terms, you may be in error.)
- 2) Only what is printed in the contract is binding. If you are told anything that conflicts with the contract, ask for a letter verifying what you have been told. If a certain condition is important to you, ask for written clarification, if the contract doesn't clearly say what you want.
- 3) If there is a lump-sum payment to buy into the unit, under what circumstances can you get the buy-in back? Can you get all or part of the buy-in back if you decide you do not like group housing? How long of a period are you allowed to decide if congregate housing is for you?
- 4) Can you get all or part of the buy-in back if you decide you do not like group housing? How long of a period are you allowed to decide if congregate housing is for you?
- 5) If part of the buy-in is returned at your death, how is it returned? Do you designate a beneficiary or does it become part of your estate?
- 6) If the housing unit offers "life-time" care, these issues should be reviewed:
 - a) Lifetime care may not be guaranteed just because the housing unit has a large buy-in.
 - b) Who decides where care is provided (i.e. your apartment, assisted living, infirmary)?
 - c) If you are in the infirmary for long-term nursing care, how long can you also maintain your apartment?
- d) Is there an appeal system if you disagree with a placement decision, or don't want to give up your apartment?
- e) What extra costs will arise if you cannot stay in your apartment?
- 7) In addition to the buy-in, there is a monthly payment due. (Statistically these monthly payments have increased more rapidly than the annual inflation rate or the social security cost-of-living adjustment. Do you have sufficient cushion between your monthly income and the monthly payment?)
- 8) What happens if you can't meet the monthly payment? Do you lose the full buy-in if you move out because you can't make the monthly payment?
- 9) How solvent is the housing unit? How much does it have in reserve? How often has the management/ownership changed in the past 10 years? The Board of Directors is made up of at least 25% residents. These resident board members may be the best persons from whom to get this information.
- 10) If there is a long-term care part of the facility, can it provide all levels of care? If not, at whose cost do you receive higher levels of care at another facility?

This fact sheet is distributed to help you obtain information regarding available community services and is not an inclusive list of providers. The information is subject to change following publication.