

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. *The earlier you join our waiting list, the more choices you'll have when you're ready to move.*
- ___ Return your annual survey each year, even if you are not ready to move. This ensures that your contact info is always up-to-date in our system.
- ___ Review our most recent Disclosure Statement, which is available at ncdoi.gov.

6 MONTHS-3 YEARS BEFORE MOVE IN (Approximately)

2) Complete Annual Survey & Select Home Types

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

2-4 MONTHS BEFORE MOVE IN (Approximately)

3) Review Your Potential Home Offer

- ___ Receive and review our most recent Disclosure Statement.

4) Schedule Medical Screening

- ___ Drop off or 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). *We require 2 years of medical history.*

5) Complete Pre-Residency Paperwork

- ___ Return Financial Report & Supporting Documentation
- ___ Return Disclosure and Release (Background) Form
- ___ Return Smoking Policy
- ___ Return Pet Policy / Pet Interview with President/CEO (if applicable)

30-90 DAYS BEFORE MOVE IN (Approximately)

6) Receive Acceptance Letter

- ___ Submit \$25,000 deposit. This and your \$1,000 wait list fee apply to your entrance fee.

7) Decide On Your Home Selections

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

****CONTINUED ON REVERSE****

8) Contact Real Estate Agent & Mover Regarding Placing Your Current Home For Sale (if applicable) - *Do NOT close on your home sale until a firm date has been agreed upon for your Carolina Village home to be ready. Carolina Village is not responsible for providing temporary housing.*

9) Schedule New Resident Orientation

10) 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
- Current Photo

11) Review Utility Options with I.T.

- Choose your internet, television, and phone services

12) Prepare for Move

- Provide moving company name and details

13) Purchase Renter's Insurance (Optional)

5-7 DAYS BEFORE MOVE IN (Approximately)

14) Sign Occupancy Agreement & Walk Through

- Sign Occupancy Agreement, submit your entrance fee, & receive your keys.
- Walk through your new home with the Director of Facility Services.
- Receive your pendant and name badge.

15) 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.
- Submit work orders through the Hub for maintenance or special services.

MOVING DAY! Official Move In Date: _____

**Carolina
Village**[®]

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