



## STEPS FOR RESERVING A RESIDENCE AT SOUTHPONTE VILLAGE

### **STEP ONE - FINANCIAL APPROVAL**

Upon submitting your required financial information to Willow Valley Communities, you will receive an email communication from your Sales Counselor notifying you of your financial approval status. This will happen when you join the wait list OR when you apply for admission. If you have joined our wait list, your financial information will be reviewed again when you apply for admission.

### **STEP TWO – REQUIRED FORMS & FEES**

**The selected Residence is reserved when the following required forms and initial fees are received by Willow Valley Communities:**

- W-9 forms (completed and signed by each applicant)
- Application for Residency (completed and signed by each applicant)
- **\$400 per person, non-refundable Application Processing Fee**  
(Check payable to "Willow Valley Communities")
- Residence Selection Confirmation form (signed by each applicant)
- **10% of the Entrance Fee** (This deposit will be put into an escrow account)  
(Check payable to "Willow Valley Communities")
- Acknowledgement Form (signed by each applicant)
- Steps for Reserving a Residence at SouthPointe Village (signed by each applicant)
- Medical Insurance Responsibility form (signed by each applicant)
- If applicable, a completed Pet Application, including two photos

**You will receive the following from your Sales Counselor:**

- Resident's Agreement
- Current Disclosure Statement including the referenced Exhibit A
- Preadmission Medical Form (to be completed by your Primary Care physician)

### **STEP THREE - ADMISSION INTERVIEW & ADMISSIONS APPROVAL**

- Once Willow Valley Communities has received your Preadmission Medical Information form and a copy of your physical exam summary from your Primary Care physician, the Admissions Review Counselor (Cheryl McClune) will contact you to schedule your **in-person Admissions Interview**. Please bring your medical insurance cards to this meeting.

Please note: Your Sales Counselor will contact you when it is time to submit your Preadmission Medical Information to your Primary Care Physician. Willow Valley Communities requires your last physical exam to have occurred no more than six months prior to the completion of the Preadmission Medical Information form.

- Your Admission Interview must be scheduled **within two weeks of receiving your completed Preadmission Medical Information form**.
- During your Admissions Interview, you may be asked questions about your physical, cognitive, mental and/or behavioral health, current medical conditions, and medications. In addition, you will be required to complete a brief cognitive assessment.
- You may be asked to provide additional medical information before a decision can be reached regarding Admission Approval.
- The Move Counselor (Erin Weagly) will notify you (via email communication) that you have been accepted for residency at Willow Valley Communities.
- The Move Counselor (Erin Weagly) will call you to schedule an appointment for you to sign your Resident's Agreement.

### **STEP FOUR - DESIGN APPOINTMENT**

- A Design Studio representative will contact you to schedule your design appointment. The design appointment typically lasts four hours. At this appointment you will review the included features as well as available personal choices.
- **Design selections must be finalized and payment must be received for available personal choice selections within five days following your design appointment. This payment is non-refundable.**

## **STEP FIVE - RESIDENT'S AGREEMENT**

- During your Resident's Agreement signing appointment, the Move Counselor (Erin Weagly) will review the Resident's Agreement with you.
- A deposit of **25% of the Entrance Fee is collected at the signing of your Resident's Agreement.** (At this time all prior deposits will be transferred from the escrow account and a check for accrued interest will be mailed to you.)
- Timing of this appointment will depend on the start of construction for your building. A schedule will be provided at a later date.
- The Move Counselor will email you information pertaining to your upcoming move.
- You will be provided details regarding New Resident Orientation. New Resident Orientation is an opportunity to gather essential information regarding Resident life and activities at Willow Valley Communities.

## **STEP SIX - MOVING PREPARATION**

- You will be notified 60 days prior to the date of availability for move-in. In order to avoid potential conflicts, the Move Counselor (Erin Weagly) will call you to discuss a move-in date. **PRIOR** to making any final arrangements with your moving company, please confirm your move date with Erin.

## **STEP SEVEN - FINAL ENTRANCE PAYMENT & START OF MONTHLY SERVICE FEE**

- **The remaining 65% of your Entrance Fee is due upon move-in or no later than 60 days after the residence completion date.**
- Your Monthly Service Fee will start upon move-in or no later than 60 days after the residence completion date.

**Please note:** Entrance Fee deposits are fully refundable up to 120 days after the start of the Monthly Service Fee as outlined in your Resident's Agreement.

I/We understand and agree with the steps outlined above.

\_\_\_\_\_

Resident

\_\_\_\_\_

Date

\_\_\_\_\_

Resident

\_\_\_\_\_

Date

\_\_\_\_\_

Sales Counselor

\_\_\_\_\_

Date