

# Pilgrim Place Housing Offer Process

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Pilgrim Place seeks to offer housing to persons on the Approved Applicant Housing List that meets their personal needs and desires and, whenever possible, during their desired year of entrance. The following procedure is followed when a housing opportunity is offered to and accepted by an Approved Applicant.

One year prior to desired year of entrance, the Approved Applicant completes the confidential Financial Information Form and returns it to the Pilgrim Place Director of Admission who gives it to the Vice President for Finance for review. At the same time, the Approved Applicant completes the Housing Preference Information Form and returns it to the Director of Admission.

Approximately six months prior to receiving a housing offer, the Approved Applicant completes the confidential Medical Information Form and returns it to the Director of Admission. The Vice President for Health Services, Clinic Staff, and Attending Physician review this Form to determine the Applicants' ability to live in independent living.

When a housing unit becomes available, Approved Applicants are contacted based on their Priority Points, stated housing preferences, and financial capacity. Upon receiving a housing offer, the Approved Applicant may either 1. immediately refuse the offer thereby avoiding a "turn down" (only two "turn downs" are permitted before losing rank on the Housing List) or 2. proceed with receiving an information packet about the offered unit. The Approved Applicant schedules an on-campus visit as soon as possible (within two weeks of the offer) to see the unit.

Upon accepting the unit, the Approved Applicant pays the equivalent of one month's rent plus 10% of the selected Entrance Fee as a deposit. Approved Applicants choose from two Entrance Fee options: either a Non-refundable Entrance Fee (a one-time non-refundable fee based on square footage and amenities of the residential unit) or a Deferred Repayment Entrance Fee (a one-time fee based on a higher rate per square foot and amenities of the residential unit with 90% payable to one's estate upon reoccupancy of the unit). Information provided on the Financial Information Form determines whether an individual or couple may be eligible for the Month-to-Month entrance option without an Entrance Fee but higher Monthly Fee (limited to three households per year).

Upon paying the deposit, the Approved Applicant meets with Buildings and Grounds to make interior selections as described in the "Basic Preparations for Houses/Apartments" document.

When Buildings and Grounds staff determines that the residence is ready for occupancy, the Approved Applicant signs the Care and Resident Agreement, pays the remainder of the Entrance Fee, begins paying the Monthly Fee, and arranges a move-in date. The Entrance Fee must be paid in full at the ready for occupancy date. If, for some reason, payment cannot be made, the resident must sign a promissory note for the unpaid balance of the entrance fee. The promissory note is limited to a 90-day period and will accrue interest at a market-based rate.

Prior to moving into the community, new residents receive information on beginning their residency on campus and orientation opportunities. New residents are assigned a Mentor, introduced in the dining room, and encouraged to participate in the many campus activities.

We look forward to welcoming you to Pilgrim Place.

## **Pilgrim Place**

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