

DUNWOODY VILLAGE

3500 West Chester Pike • Newtown Square, PA 19073

610-359-4400 • Hearing Impaired 1-800-654-5984

Marketing Department: 610-359-4425 • marketing@dunwoody.org

PRIORITY LIST AGREEMENT

Name Applicant 1	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. <input type="checkbox"/> Miss	Date of Birth ____/____/____
Name Applicant 2	<input type="checkbox"/> Mr. <input type="checkbox"/> Ms. <input type="checkbox"/> Mrs. <input type="checkbox"/> Dr. <input type="checkbox"/> Miss	Date of Birth ____/____/____
Address		
City, State, Zip		
Home Phone		
Cell Phone	Applicant 1	Applicant 2
Email	Applicant 1	Applicant 2

Style of Unit(s) Desired (limit 3):			
Apartment		Country House	Penrose
___ Studio ___ Junior ___ ANY 1 Bedroom (or select specific styles below) ___ 1 BR (standard) ___ 1 BR (custom) ___ 1 BR "J" ___ 1 BR "J"/ sunroom	___ ANY 2BR (or select specific styles below) ___ 2 BR (standard) ___ 2 BR (custom) ___ 2 BR custom/den	___ West (1BR/1BA) ___ West (2BR/2BA) ___ East (2BR/2BA/Den)	___ Single Story ___ Brandywine ___ Longwood ___ Two Story ___ Fairmount ___ Winterthur
Approximate Timeframe of Desired Residence at Dunwoody Village:			
___ Within one year	___ 1-3 years	___ 4-6 years	___ 6-10 years
If you have been referred by a Dunwoody resident, please tell us who so we can thank them!			
Your signature acknowledges that you have reviewed the Priority List Agreement terms found on page 2.			
_____ Signature: Applicant 1		_____ Signature: Applicant 2	
_____ Date		_____ Date	

PRIORITY WAITING LIST TERMS AND CONDITIONS

1. To become a member of the Dunwoody Village Priority List, please sign this Agreement on page 1 and return to the Dunwoody Village Marketing Department along with the following:
 - The completed two-page Financial Statement, together with the first two pages of your most recent tax return and summary pages of investment accounts (see Item 6 of the Financial Statement)
 - Payment of the Priority Fee:
 - \$1,300 for an individual, of which \$300 is a non-refundable Processing Fee, or
 - \$1,400 for two persons, of which \$400 is a non-refundable Processing Fee.
2. Upon approval by the Chief Financial Officer, applicants will be added to the Priority List based on the date of the application.
3. Priority List Members are offered available units as such units become available, based upon their selected styles and in the order of their becoming Priority List members.
4. Upon acceptance of a residence, updated financial information will be reviewed by the Chief Financial Officer, and the applicant will undergo a medical approval process consisting of the administration of a MoCA cognitive assessment and a review of a year's worth of medical records from the applicant's primary care physician.
5. Dunwoody does not pay interest on Priority List Deposits.
6. Priority Fees will be refunded within 30 days of receipt of a written request by Applicant or their legally appointed designee. A refund requested will be made payable to Applicant, or upon death to the Estate of the Applicant. The Applicant forfeits their priority list position when removed from the priority list.
7. Except as provided in item 4, regarding refunds, an Applicant's rights under this Agreement are personal to him/her, may not be assigned, and shall not pass to his/her heirs or personal representative. If application is made by two prospective residents, both are deemed to be included in the word "Applicant" as used in this Agreement, and payment of a Priority Fee shall cover both.
8. Notice of an available unit can be given to an Applicant via telephone, email, and/or U.S. mail, as such contact information is provided herein or is updated, in writing, directed to the Dunwoody Village Marketing Department.
9. This Agreement does not commit Dunwoody to admit the Applicant. The decision whether to admit an Applicant is made by Dunwoody in the exercise of its sole direction. If the decision of Dunwoody is to *not* admit an Applicant, the Applicant agrees to accept such decision as binding and final in all respects.
10. This Agreement shall supersede any Priority List Agreement previously signed by the Applicant.
11. The Applicant acknowledges receipt of the most recent Dunwoody Village Annual Report/Disclosure Statement available at the time of this application.

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FINANCIAL STATEMENT

[If two people are applying and maintain separate finances, please complete separate Financial Statements.]

The Board of Trustees of Dunwoody Village, a Pennsylvania not-for-profit corporation, respects the privacy of every applicant and does not wish to intrude into any applicant's personal financial circumstances other than to have assurance that the applicant has adequate financial resources to live comfortably at Dunwoody Village. The Board is not interested in total estate, but rather only sufficient assets to cover admission costs, monthly charges for life, and personal needs and obligations. This information will be kept confidential.

Name:

Applicant #1 _____ Date of Birth _____

Applicant #2 _____ Date of Birth _____

Type(s) of residential home desired: _____

SECTION 1: REAL ESTATE ASSETS

Real Estate #1
Address:

Value:

Real Estate #2
Address:

Value:

SECTION 2: NON-REAL ESTATE ASSETS (Attach schedule if more space is needed.)

Securities	\$ _____	Notes/Comments
Savings.	\$ _____	
IRA/401k	\$ _____	
Other	\$ _____	
TOTAL	\$ _____	

SECTION 3: GROSS INCOME: (Do not include IRA/401K Distributions)

Social Security	\$ _____	monthly	\$ _____	yearly	Notes/Comments
Pensions	\$ _____	monthly	\$ _____	yearly	
Annuities	\$ _____	monthly	\$ _____	yearly	
Trust	\$ _____	monthly	\$ _____	yearly	
Rental Income	\$ _____	monthly	\$ _____	yearly	
Dividends			\$ _____	yearly	
Interest Income			\$ _____	yearly	
Other (describe)			\$ _____	yearly	
TOTAL	\$ _____				

SECTION 4: Excluding the Dunwoody monthly fee, please provide an estimate of your anticipated monthly personal expenses after you become a resident: Monthly Amount \$ _____

SECTION 5: Do any of the following items increase, and if so, on what basis? Will there be a change with the death of one spouse?

Pensions _____ Notes/Comments:

Annuity _____

Trust _____

Rental _____

SECTION 6: Please include the following documents with this Financial Statement:

- Pages 1 & 2 of your most recent IRS tax return (if you itemize, please include Schedules A-E)
- Most recent investment account statements (summary page showing total balance is acceptable)
- Other relevant information (i.e. savings and checking account statements, personal worksheets, etc.)

SECTION 7: Please list any liabilities such as mortgages, loans and any other long-term debt you currently carry.

Description	Amount
_____	\$ _____
_____	\$ _____
_____	\$ _____

SECTION 8: The following is contact information for my/our advisors and their firms, whom you may consult regarding my/our application for admission to Dunwoody.

Banker/Trust Officer _____

Investment Advisor _____

Attorney _____

Other _____

FOR OFFICE USE ONLY:

Unit Type: _____ Occupancy: Single _____ Double _____

Approved by _____ Date: _____