



**CONFIDENTIAL**

**Application for Residency  
 Tel Hai Retirement Community  
 1200 Tel Hai Circle, PO Box 190  
 Honey Brook, PA 19344**

• Name: Mr./Mrs. \_\_\_\_\_  
 Ms./Miss \_\_\_\_\_  
 Dr./Rev. \_\_\_\_\_  
 Last First Middle

• Present Address: \_\_\_\_\_  
 Street City State/Zip

• Telephone: ( ) \_\_\_\_\_ (Circle one: Home – Work – Cell)

• ( ) \_\_\_\_\_ (Circle one: Home – Work – Cell)

• E-Mail: \_\_\_\_\_

• Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_ Current Age: \_\_\_\_\_

• Marital Status:  Married  Widowed  
 Single  Divorced

• Name of Spouse: \_\_\_\_\_  
 Last First Middle

Spouse's date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_ Current Age: \_\_\_\_\_

Spouse deceased? (date) \_\_\_\_\_

How did you learn about Tel Hai?  From a friend  
 From a Tel Hai Resident  
 From a family member  
 Other: (identify source) \_\_\_\_\_

Tel Hai is a non smoking community. Smoking is prohibited in households, common areas, and the grounds.

Will this cause you a hardship? Yes/No \_\_\_\_\_ Yes/No \_\_\_\_\_

Do you have long-term care insurance? \_\_\_\_\_  
 (Please provide a copy of the Schedule of Benefits with this application) Company Name Company Name

What is your daily or monthly benefit? \_\_\_\_\_

At what rate does this increase each year? \_\_\_\_\_

How long does your policy pay for? \_\_\_\_\_

Is this a partnership plan? Yes/No \_\_\_\_\_

**FINANCIAL STATEMENT:**

Please enclose a photocopy of your most recent Federal Income Tax Return and indicate the owner of each asset or liability by using the following codes in the appropriate spaces below:

**H=Head of household**

**S=Spouse**

**J=Joint**

<b>Assets by Type</b>	<b>H/S/J</b>	<b>Total</b>	<b>Comments</b>
Savings Accounts			
Checking Accounts			
Investment Accounts (i.e, Stocks/Bonds)			
Real Estate Including Current Home			
Certificates of Deposit			
IRA, 401(k) and/or 403(b)			
Annuities			
Trust Accounts			
Other			
<b>Total Assets</b>			

<b>Liabilities by Type</b>	<b>H/S/J</b>	<b>Total</b>	<b>Comments</b>
Notes Payable			
Mortgages on Real Estate			
Other Debt/Itemized:			
Credit Card			
Auto Loans			
Home Equity Loans			
<b>Total Liabilities</b>			

• **Investment Accounts (Stocks/Bonds) (Attach photocopy of most recent investment statement of account if you prefer)**

<u>Description</u>	<u>(Code: H/S/J)</u>	<u>Market Value</u>	<u>Comments</u>

**Total:** \_\_\_\_\_

• **Real Estate Owned**

<u>Description</u>	<u>(Code: H/S/J)</u>	<u>Market Value</u>	<u>Mortgage Balance</u>

**Total:** \_\_\_\_\_

• **Other Assets - Certificates of Deposit, IRA, Annuities, Trust Accounts**

<u>Description</u>	<u>(Code: H/S/J)</u>	<u>Market Value</u>	<u>Comments</u>

**Total:** \_\_\_\_\_

**INCOME SOURCES (Monthly):**

Will there be a change in monthly income received upon the death of one spouse?  
Please describe on a separate sheet if this is the case.

Type:	Head	Spouse	Joint
Social Security			
Pension			
Annuity			
Dividends			
Interest			
Other			
<b>Total Monthly Income:</b>			

Is your income adequate to cover your monthly expenses including medications and insurance payments? \_\_\_\_\_

Have you disposed of any property, real or personal, within the last three years? Please explain:

I/We affirm that the foregoing is a true statement of facts known to me/us and it is submitted as part of an application for residency at Tel Hai Retirement Community.

Date: \_\_\_\_\_

Signed: \_\_\_\_\_

Spouse's Signature: \_\_\_\_\_

Approximate desired date of residence at Tel Hai Retirement Community: \_\_\_\_\_

Residence desired: Check all that apply.

Cottage

Standard (936 – 1199 sq. ft.)  Large (1200 – 1499 sq. ft.)

Deluxe (1500 – 1890 sq. ft.)  New (1408 – 1890 sq. ft.)

Hillcrest Apartment:

Studio (548 sq. ft.)  One Bedroom (707 – 774 sq. ft.)

Two Bedroom (949 – 1058 sq. ft.)  Large Two Bedroom (1111 – 1276 sq. ft.)

Deluxe Two Bedroom (1360 – 1420 sq. ft.)

Two Bedroom with Den (1508 sq. ft.)

Attachments required at the time of submission of this application:

**Signed & dated Application and Administration Procedure Agreement**

Photocopy of most recent Federal Income Tax return

Photocopy of health insurance cards and drivers license.

Check payable to "Tel Hai Retirement Community" in the amount of \$250.00

**Office Use Only**

Date Received:  
Reviewer's Comments

By:

Check No: \_\_\_\_\_ Amount: \_\_\_\_\_



**Tel Hai Retirement Community**  
**1200 Tel Hai Circle, PO Box 190**  
**Honey Brook, PA 19344**  
**(610) 273-9333**

### **Application and Admissions Procedure Agreement for Residential Living**

1. Persons wishing to assure themselves of a position on the Residential Living waiting list at Tel Hai may do so by completing and delivering the Application and the Application and Admissions Procedure Agreement, to Tel Hai Retirement Community, accompanied by a payment of \$250 (non-refundable) per residential unit.
2. In return for the payment of the Application Fee, Tel Hai Retirement Community will add the Applicant's name/names to its waiting list subject to this Statement of Application and Admission Agreement and application approval.
3. This Application Agreement does not commit Tel Hai Retirement Community to admit the Applicant, rather only to enter Applicant's name to the waiting list. The decision whether to admit an Applicant is made by Tel Hai Retirement Community, in the exercise of its sole discretion, at the time of Admissions Committee Interview. If the decision of Tel Hai Retirement Community is not to admit an Applicant, the Applicant agrees to accept such decision as binding and final in all respects.
4. An Applicant is processed according to the date the application, application fee, and application agreement is received. This date establishes their priority on the waiting list.
5. **Tel Hai will provide for your review; Financial Disclosure Statement, Handbook, and Residence and Care Agreement.** A mutually agreed upon time will be made for meeting with the Admissions Committee and signing of the Residence and Care Agreement. This date begins the 90 day period before occupancy.
6. When a residential unit becomes available and the Applicant's name is at the top of the waiting list, Tel Hai Retirement Community will ask the Applicant to inspect the cottage/apartment and make a decision regarding occupancy. **If the person/s desire/s to make this cottage or apartment their campus home, and they have Admissions Committee approval, a reservation fee in the amount of ten percent (10%) of the published entrance fee is required at this time.**
7. **Within 60 days from that Admissions Committee Interview an additional twenty-percent (20%) payment shall be made to the Tel Hai Retirement Community. Any optional upgrades selected will be paid in full at this time.**

**In the event this Agreement is terminated prior to the Occupancy date and so long as the reason is not related to illness, injury, incapacity or death, Tel Hai will retain Two Thousand Five Hundred Dollars (\$2,500) of any of the above down payments as well as all optional upgrades.**

**Should the Admissions review result in the denial of admission, the entire reservation fee shall be refunded to the applicant/s.**

If final approval is given by the Admissions Committee the balance of the entrance fee is payable as follows:

**Final payment is made at the date of occupancy; however, if the residential unit is not occupied within 90 days of the Admissions Committee Interview date, payment in full is required at that time.** Payment of utilities and/or monthly fees begins on the date of occupancy or at the end of the ninety-day period described above.

- 8. The Residence & Care Agreement is signed providing priority access to Health Care, Personal Care as well as Residential Living accommodations, all on a *Fee-For-Service* basis.
- 9. Tel Hai Retirement Community may at any time change its' Schedule of Fees; the Marketing Office will keep you current with these changes.
- 10. Tel Hai Retirement Community at any time may change its Statement of Application and Procedures for Admission.
- 11. Tel Hai Retirement Community will not pay interest on any Application Fee or Reservation Fee.
- 12. Any notice to an Applicant shall be sufficiently given if mailed to the address below or as Applicant may later advise Tel Hai Retirement Community. It is the Applicant's responsibility to inform Tel Hai of any change in their address or telephone number.
- 13. This agreement shall supersede any Statement or Agreement previously signed by the Applicant.

Applicant \_\_\_\_\_ Date \_\_\_\_\_

Address: \_\_\_\_\_

Tel Hai Retirement Community \_\_\_\_\_ Date \_\_\_\_\_

by \_\_\_\_\_