

Sidney and Pat Booth moved into their 1,300 square foot Croasdale Village apartment from their 4,000 square foot home off of Hope Valley Road. (Below) Charles Mercer works out in the gym at Croasdale Village



Ready to Retire?

How to ease into a local CCRC

BY MICHELE LYNN | Photography by Briana Brough

The kids are grown ... the career is winding down ... the house is too big. What's next? For many active retirees, the answer is a move to a continuing care retirement community (CCRC). CCRCs offer housing ranging from apartments, homes and villas for those who live very independently, to assisted living facilities offering more support, to nursing homes for those needing skilled nursing care. CCRC residents are able to move from one housing option to another as their needs change.

If you are considering a move to a

CCRC, there are a few steps to take. The first, and perhaps most important, is to explore your options sooner rather than later. Many communities have long waiting lists and require applicants to pass a health assessment upon admittance, so they recommend that retirees start considering communities in their 50s and 60s.

Murry and Jerry Perlmutter, who moved from the Chicago suburbs to The Forest at Duke in 2007 when they were 69 and 75 respectively, put their names on the waiting list at The Forest

five years before they moved. "When searching for the right community, it's important to develop criteria that are important to you," says Jerry. "I would tell [prospective applicants] to spend a lot of time in the communities they are considering," says Murry. "When we were looking, we would come and spend five days living in the guestroom here and sign up for every activity. Each night we would get hosted by another member of the community so we could get to know people and

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see if this was the right fit.” Murry says that it’s a very important decision since, “these are the people we are going to live with for the rest of our lives.”

Figuring out your financial needs for this life change is another item on the to-do list. Jerry says, “We found it very important to find a good financial planner who told us, ‘This is what it will cost you to live at the Forest.’”

The Perlmutter completed an independent financial assessment, which, according to Jerry, “helped to ensure that we could maintain a decent standard of living when we came here and reduced a lot of our financial anxiety.”

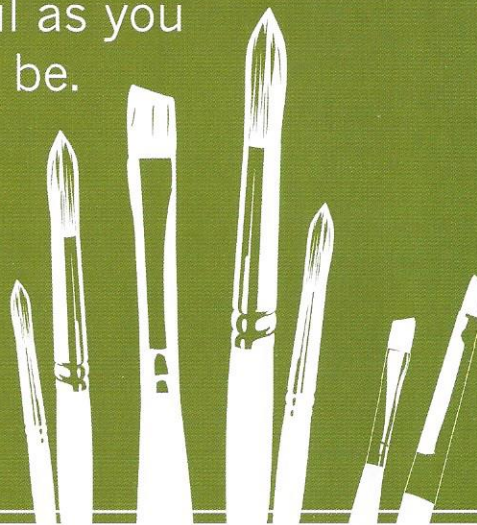
After accumulating a lifetime’s worth of furniture and possessions, it’s critical to start downsizing long before the move. Pat Booth and her husband, Sidney, moved into their nearly 1,300-square-foot apartment in Croasdaile Village after living for 31 years in a 4,000-square-foot home off of Hope Valley Road. “Downsizing is an unbelievably complicated process,” says Pat. “People should start soon after deciding to move; you don’t want to have to downsize in a hurry when you get the call that [the CCRC] has the perfect place for you.”

Once & Again, a high-end furniture and collectibles consignment store on U.S. 15-501, is just one resource that can help in the downsizing process. According to store vice president Frank Bednaz, “It’s important that people not wait until the last minute to contact us. Sometimes we don’t have the room to help them.”

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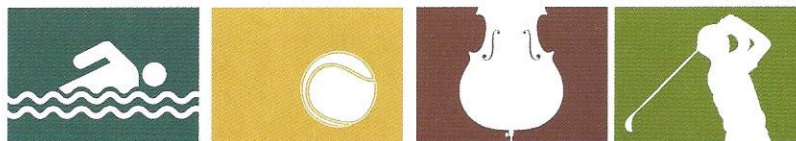


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Jerry (left) and Murry Perlmutter lunch with friends in The Forest at Duke.



**The earlier you get on
the waiting list, the
better and more
options you will have.**

While some retirees consign unneeded furniture, others give it to their children, use the services of local estate sales professionals, hold garage sales or list items on Craigslist (the online buying and selling Web site).

Now that your house has been de-cluttered, it is time to sell it. "My husband had figured out what we might expect in terms of wait time," says Donna Maroni who moved to Carolina Meadows with her husband, Gustavo, last September. "We put our house on the market early enough so we could sell it and then expect to move here a few months after." After selling their home, the Maronis took a short-term apartment lease and put most of their belongings in storage until they received the call from Carolina Meadows.

CCRC residents say that taking the move step-by-step helps ensure a smooth transition to this next, and greatly enjoyed, stage of life. "Living here feels like the gift that keeps on giving," says Murry Perlmutter. "We have gifted ourselves by putting ourselves in this wonderful situation and we have gifted our children, who are secure in knowing where we are and that we are going to get good care for the rest of our lives." **DM**