



April 10, 2025

Dear Heritage Residents,

As a follow-up to the Semi-Annual meeting and the Leadership Meeting, we had provided the completed the Aging In Place - Level Of Care Pricing (AIP-LOC) for those residents with a service fee contract. This memo is intended to give you additional information.

The elements of this pricing are based upon your individual assessment to determine the Level of Care (LOC) required to support you in your Apartment (Aging-In-Place or AIP).

Service Fee Contract Residents will continue to pay their monthly fee for their apartment.

In addition to your monthly fee, if you just need occasional support but you are not at a Level Of Care (less than 40 points in any recent assessment), these fees are based on the Service Fees schedule. The services listed on the Service Fee Schedule list are not all inclusive, so please note that “Like” services will be billed at rates akin to similar services. For example, *escort* service to the doctor will be billed at the same service rate that is charged for *escort* service to dining. The Service Fee schedule is being updated with additional detail and costs.

Level 1 fee is \$2,420 Point Range = 41 - 80
Level 2 fee is \$3,620 Point Range = 81 - 100
Level 3 fee is \$4,420 Point Range = 101 - 120
Level 4 fee is \$5,220 Point Range = 121 - 140
Level 5 fee is \$8,820 Point Range = 141 - 300

If you require more care over a Level 5, it will be billed at \$29.00 per hour of support you receive.

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The Medical Team will go over your individual assessment and explain the care and related points required to provide the care service. Note that there are a lot more points in the new system to better define the service level that is required to serve you.

For Service Fee Contract Residents, incontinence Care will continue to be charged at \$1,500/month additional at any level of care.

All Level of Care Fees are based on Heritage on the Marina's cost to provide these services.

The fees are subject to change based on the cost to provide the service (typically this will be once a year). These fees are not subject to the 60-day notice requirement, but we will endeavor to let you know as soon as possible of any increase. Changes to these fees are not tied to the annual increase for your monthly fees.

Other related changes:

If you require respite in an Assisted Living apartment in the Perry Building, current residents can stay there up to 30 days. During that time, you will continue to pay the Monthly Fee for your current apartment while going through the assessment process.

Assuming you can return to your apartment, you will move back to your apartment and pay the appropriate service fees for support, or the AIP-LOC fee based on your assessment.

If you will not be able to return to your apartment, you have the option to turn your apartment back to Heritage and move permanently to Assisted Living at the 15% discounted rate.

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For couples, when one of you needs to be in Assisted Living, the fees will be your independent living monthly fee cost, your 2nd person Fee, and the appropriate AIP-LOC charge.

If there is an instance where the couple require services at a Level of Care, and both wish to remain in the unit, the fees will be your independent living monthly fee cost, your 2nd person Fee, and the appropriate AIP-LOC charge for each of the individual residents.

These AIP-LOC fees take effect immediately. As noted, the service fee schedule for occasional support services is being updated and will be distributed soon.

Please let us know if you have any questions.

Thank You

Mary Linde and Jonathan Casey

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