



**Norton Garden Apartments**



**Amistad Apartments**

## **What are the new Norton Garden and Amistad Apartments?**

Pilgrim Place is preparing to build eighteen new two-bedroom, two-bathroom apartments in two campus locations for new residents. **Thirteen new Norton Garden Apartments** will be located to the side and on the second floor of the new Administrative Offices on Mayflower Road. They will be surrounded by beautiful native plant gardens and walking paths. **Five Amistad Apartments** will be located on the second floor of the new, fourth wing of Pitzer Lodge on lovely Leyden Lane. Both apartment buildings feature a private lobby with comfortable seating, personal mailboxes, and elevator to the second floor. Each of these spacious and energy-efficient apartments provide an ideal setting for new residents.

## **What's so special about the new Norton Garden and Amistad Apartments?**

The eighteen apartments feature Gold-Certified LEED construction including state-of-the-art environmentally-sound building supplies and technology.<sup>1</sup> Upon completion, Pilgrim Place will likely be the first retirement community in the United States to have two major buildings that are LEED-certified. This energy-efficient technology means greater comfort and lower utility bills for residents.

## **When will the new apartments become available?**

We anticipate that the Norton Garden Apartments will be ready for occupancy in December 2010 and the Amistad Apartments ready for occupancy May 2011. Date of occupancy may change depending on the construction schedule or unanticipated delays.

## **Who may reserve one of the new apartments?**

Approved Applicants on the Pilgrim Place Housing List have the opportunity to reserve one of the remaining Norton Garden or Amistad Apartments as your future residence. The following apartments are currently available: Norton Garden 102, 203, 204, and 205, and Amistad Apartments 201, 202, 203, and 205.

Since the number of apartments is limited, spaces will be filled in the order in which reservations are received. Those who respond after capacity has been reached will be placed on a Waiting List, if desired.

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<sup>1</sup> Leadership in Energy and Environmental Design (LEED) is certified by the U.S. Green Building Council. The LEED Green Building Rating System evaluates a building's energy efficiencies, site development, water savings, materials selections and indoor environmental quality. The New Norton Garden and Amistad Apartments will adhere to high environmental standards that reflect the values of Pilgrim Place residents.

**How do I reserve one of the apartments?**

Interested persons return the Reservation Form, \$1,000 Reservation Fee, and Pilgrim Place Special Deposit Agreement to reserve an apartment. Since apartment selection will occur on a first-respond/first-select basis, persons who respond quickly are more likely to receive their first choice of apartment location and floor plan.

**If only a limited number of apartments are available, why am I receiving floor plans for all of residences?**

If, by chance, one of the reservations is released, you may be contacted to see if you wish to reserve one of the other apartments. These floor plans will serve as reference.

**Describe the timeline for reserving, selecting, and moving into one of the new apartments.**

Current	Reservation Forms, \$1,000 Reservation Fees, and Pilgrim Place Special Deposit Agreements priority deadline, with the fee placed in an interest-bearing escrow account.
One Month Later	The Entrance Deposit (the equivalent of 10% of Entrance Fee minus the \$1,000 Reservation Fee) is paid to Pilgrim Place and placed in an interest-bearing escrow account.
September 2009	Tree removal, unit demolition, ground preparation, and new construction begins on Norton Garden Apartments.
Nov.-Dec. 2009	Unit demolition, ground preparation, and new construction begins on Amistad Apartments.
December 2010	Norton Garden Apartments complete and ready for occupancy. Remaining 90% of Entrance Fee paid to Pilgrim Place when apartments are ready for occupancy. Residents begin paying the Monthly Fee on the first day the apartments are ready for occupancy, regardless of actual move-in date.
May 2011	Amistad Apartments complete and ready for occupancy. Remaining 90% of Entrance Fee paid to Pilgrim Place when apartments are ready for occupancy. Residents begin paying the Monthly Fee on the first day the apartments are ready for occupancy, regardless of actual move-in date.

**What are the Entrance Fees and Monthly Fees for the Norton Garden and Amistad Apartments?**

The Entrance and Monthly Fees are based on the square footage of your selected apartment. For a list of the eighteen apartments, square footages, and anticipated fees, please see the Norton Garden and Amistad Apartment Entrance Fee and Monthly Fee charts located in this packet.

**Are the Entrance Fees and Monthly Fees for the Norton Garden and Amistad Apartments more than fees for current homes?**

Yes. Since the Norton Garden and Amistad Apartments feature LEED-certified construction including energy-efficient construction materials and appliances, and upgraded interior finishes, the Entrance Fee will be slightly higher than current homes. Although the Monthly Fee initially will be higher, the rate of annual increases will be lower during the next several years. This means that Monthly Fees for both new and older homes will eventually become equal.

**Is the Reservation Fee or Deposit Fee refundable?**

Yes, prior to the beginning of construction. When construction begins, the Deposit Fee is refundable only after your apartment has been reserved and paid for by the next new resident. Please see the Pilgrim Place Special Deposit Agreement for further details.

**Who benefits from the Entrance Fee?**

Both you and the entire Pilgrim Place community benefits from Entrance Fees which provide funds to maintain and improve common areas on campus, employ top-quality staff, and provide numerous program opportunities. In addition, the Entrance Fees assure the financial stability and long-term viability of Pilgrim Place. The younger you are upon entering Pilgrim Place, the greater the benefit you receive from your entrance fee, as you enjoy more years on campus among colleagues and friends.

**Will I receive a Care and Resident Agreement?**

Yes. Pilgrim Place is licensed as a Continuing Care Retirement Community (CCRC) so all new residents receive a Care and Residence Agreement. This agreement clearly delineates the roles and responsibilities between the organization and the resident.

Pilgrim Place will offer two types of agreements depending on the resident's choice: A "classic" Care and Residence Agreement with a Non-Refundable Entrance Fee, *or* a 90% Deferred Repayment Entrance Fee with 90% of the original fee payable to one's estate upon reoccupancy of the unit.

A third option will be a Month-to-Month-Fee Care and Resident Agreement which permits up to three new households per year to enter Pilgrim Place without an entrance fee but with a higher Monthly Fee. The Month-to-Month option will be available for current homes under 1,000 square feet. The Month-to-Month-Fee Care and Resident Agreement option will not be available to residents reserving a new Norton Garden or Amistad Apartment.

**Are the apartments furnished?**

The apartments will be equipped with an energy-efficient stove, refrigerator, dishwasher, microwave, and washer/dryer. An interior designer has selected cabinets and Corian counter tops for the kitchens. Window blinds and sliding door vertical blinds will be installed prior to occupancy. If you wish, you may add draperies or other window treatments at your own expense. The apartments will be wired for cable TV with TimeWarner as the provider, and you may arrange start-up and program selections at your own expense. Satellite TV is not available at Norton Garden or Amistad Apartments. Buildings and Grounds will assist in the mounting of big-screen TVs.

New residents bring their own furnishings and treasured belongings to create their own unique setting. For your convenience, the enclosed floor plans indicate possible furniture arrangements. The height of the windowsills from the floor is a standard 30". This may be helpful in selecting furniture to bring to your new apartment.

First floor apartments at Norton Garden have exterior patios with landscaping to provide partial privacy. Second floor apartments at Norton Garden and Amistad have fully functioning balconies that can accommodate a small table and chairs. Small gas grills and hibachis may be utilized on patios and balconies.

**May I customize the apartment?**

Yes. New residents will have the choice of four carpet and four vinyl samples to personalize their apartments. Interiors will be painted a neutral Navajo White unless the new occupant selects and purchases an alternative paint color. (Please note that repainting will occur after the building is complete and ready for occupancy, and at the resident's expense.) Although structural changes will not be permitted, built-ins and certain custom features may be added later at the resident's expense. Residents wishing to make changes will work with Buildings and Grounds to determine feasibility, and to arrange for architects and contractors to do the work. A significant down payment for changes or renovations is required prior to commencing work. Funds used for renovations are separate from the Entrance Fee and will not be deducted from the Entrance Fee.

**Is parking and storage available?**

Yes. One carport is available for each apartment at a minimal monthly fee. Residents in Norton Garden and Amistad Apartments may utilize the shared storage areas located on the second floor of each building. These storage areas are ideal for seldom-used items such as holiday decorations. Since the carports are designed for maximum ventilation to qualify as Gold-Standard LEED construction, they cannot accommodate built-in storage units.

**May I observe the construction process?**

Yes! All Approved Applicants are encouraged to visit campus to observe the construction process. Resident Forums will be held regularly with the construction management and you will be welcome to attend.

**What will happen if I decide not to reserve a Norton Garden or Amistad Apartment?**

Persons who choose not to reserve one of the new apartments will remain on the Pilgrim Place Housing List according to their desired year of entrance and priority points. As housing becomes available on campus, prospective residents will be contacted in the order of their priority points and stated preferences. A decision not to reserve an apartment is not considered a housing offer refusal.

**What is the benefit of reserving an apartment now?**

Households who reserve an apartment can rest assured knowing when and where they will be moving into Pilgrim Place. With a plan in hand, Approved Applicants can begin preparing for their future move, possibly including downsizing possessions, selling their home, and developing relationships with Pilgrim Place residents. In light of the current lengthy Housing List, reserving an apartment guarantees your place in this dynamic retirement community. It also provides security for persons who may be approaching their 78<sup>th</sup> birthday that they will receive housing prior to reaching the upper age limit for moving into Pilgrim Place.

**Who should I contact for more information?**

For more information about the Norton Garden and Amistad Apartments or the reservation process, please contact Janet Cromwell, Director of Admission, at 909-399-5504 or [jcromwell@pilgrimplace.org](mailto:jcromwell@pilgrimplace.org). To discuss financial matters or your confidential Financial Information Form, please contact Bernie Valek, Vice President and CFO, at 909-399-5505 or [bvalek@pilgrimplace.org](mailto:bvalek@pilgrimplace.org).

**I'm interested! What should I do next?**

Complete the Reservation Form and Pilgrim Place Special Deposit Agreement, and attach your \$1,000 Reservation Fee. Checks are made payable to "Pilgrim Place and Stewart Title of California, Inc." Attention: Escrow Agent.

Mail Forms and Fee to:

Janet Cromwell  
Director of Admission  
660 Avery Road  
Claremont, CA 91711

Receipt of your Forms and Fee will be acknowledged by the Admissions Office. Funds will be deposited in an interest-bearing escrow account.

**What if my plans change and I am no longer interested in moving to Pilgrim Place?**

Please notify Janet Cromwell, Director of Admission, of your decision in writing. Only signed letters are considered official communication regarding a change in plans or desired year of entrance, or removal from the Approved Applicant list.

**And one last question. What do the names Norton Garden and Amistad represent?**

Edwin C. Norton, the first dean of Pomona College, and his wife, Frances, were actively involved in the early development of Claremont. One of the Nortons' ideas was to open their home to missionaries returning to America on furlough and to persuade other townspeople to do the same. Frances Norton was one of the 12 organizers of the early enterprise that became Pilgrim Place. The former Norton Rose Garden was a memorial to her. The new Norton Garden building is being constructed on the site of the former rose garden. Plants from the former garden have been transplanted to other locations on campus.

In Spanish, "amistad" means "friendship," and it is hoped that all who live in these apartments will find deep friendship at Pilgrim Place. Amistad also reminds us of an awful and great moment in our national history: the 1839 uprising on a slave ship that gave rise to the abolitionist movement, the fight to rid our nation of slavery, and the mission of the church to work for peace and justice.

**Pilgrim Place**

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## Norton Garden and Amistad Apartment Amenities

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Pilgrim Place is pleased to begin construction of the new Norton Garden and Amistad Apartments that feature energy-saving, green construction. Thirteen Norton Garden Apartments anticipate occupancy in December 2010 and five Amistad Apartments in May 2011. These buildings feature:

- ❖ Spanish Colonial exterior architecture with authentic exposed rafter tails, ornamental wrought-iron details, sculpted balconies, and decorative inset tile embellishments
- ❖ Spacious two-bedroom, two-bathroom floor plans
- ❖ New Gold-Certified LEED construction\*
- ❖ Photovoltaic technology using solar cells to convert sun light directly into electricity, thereby reducing utility bills in the building
- ❖ Recessed windows with single-hung, double-paned windows with Low-E glass to maintain temperature control
- ❖ Ground-floor patios or second-floor balconies for each residence
- ❖ Central lobby areas with comfortable furniture and elevators
- ❖ Energy-efficient appliances and water-conservation fixtures
- ❖ Choice of carpet and vinyl styles to accommodate resident's personal taste
- ❖ Interior storage area on second floor
- ❖ Conveniently located enclosed carports
- ❖ Attractive pedestrian walkways through drought-tolerant, native plant gardens
- ❖ Close proximity to dining room, library, reading room, arts/crafts building, exercise center, and greenhouses

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# Norton Garden Entrance Fees and Monthly Fees

*The following are the anticipated Entrance/Monthly Fees for the new Norton Garden Apartments:*

## ❖ Anticipated Fees for One Person in Norton Garden

Residence Location	Square Footage	Non-refundable One person Entrance Fee	90% Refundable One person Entrance Fee	Monthly Fee* One Person
Apt. 101	1071	\$133,875	\$214,200	\$2,271
Apt. 102	950	\$118,750	\$190,000	\$2,082
Apt. 103	950	\$118,750	\$190,000	\$2,082
Apt. 104	1109	\$138,625	\$221,800	\$2,330
Apt. 201	1071	\$133,875	\$214,200	\$2,271
Apt. 202	950	\$118,750	\$190,000	\$2,082
Apt. 203	950	\$118,750	\$190,000	\$2,082
Apt. 204	1119	\$139,875	\$223,800	\$2,346
Apt. 205	1071	\$133,875	\$214,200	\$2,271
Apt. 206	1176	\$147,000	\$235,200	\$2,435
Apt. 207	941	\$117,625	\$188,200	\$2,068
Apt. 208	1080	\$135,000	\$216,000	\$2,285
Apt. 209	1097	\$137,125	\$219,400	\$2,311

## ❖ Anticipated Fees for a Couple in Norton Garden

Residence Location	Square Footage	Non-refundable Couple Entrance Fee	90% Refundable Couple Entrance Fee	Monthly Fee* Couple
Apt. 101	1071	\$147,263	\$235,620	\$2,871
Apt. 102	950	\$130,625	\$209,000	\$2,682
Apt. 103	950	\$130,625	\$209,000	\$2,682
Apt. 104	1109	\$152,488	\$243,980	\$2,930
Apt. 201	1071	\$147,263	\$235,620	\$2,871
Apt. 202	950	\$130,625	\$209,000	\$2,682
Apt. 203	950	\$130,625	\$209,000	\$2,682
Apt. 204	1119	\$153,863	\$246,180	\$2,946
Apt. 205	1071	\$147,263	\$235,620	\$2,871
Apt. 206	1176	\$161,700	\$258,720	\$3,035
Apt. 207	941	\$129,388	\$207,020	\$2,668
Apt. 208	1080	\$148,500	\$237,600	\$2,885
Apt. 209	1097	\$150,837	\$241,340	\$2,911

Each apartment is allocated one carport space. The carport fee is an additional \$30.00 per month.

\*Monthly fee includes rent, residential fee, and dining fee.

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*Prices subject to change due to construction costs.*

# Amistad Apartment Entrance Fees and Monthly Fees

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*The following are the anticipated Entrance/Monthly Fees for the new Amistad Apartments:*

## ❖ Anticipated Fees for One Person for Amistad Apartments

Residence Location	Square Footage	Non-refundable One person Entrance Fee	90% Refundable One person Entrance Fee	Monthly Fee* One Person
Apt. 201	1227	\$165,890	\$265,425	\$2,642
Apt. 202	1108	\$149,802	\$239,683	\$2,448
Apt. 203	1159	\$156,697	\$250,715	\$2,531
Apt. 204	1259	\$170,217	\$272,347	\$2,694
Apt. 205	1204	\$162,781	\$260,449	\$2,605

## ❖ Anticipated Fees for a Couple for Amistad Apartments

Residence Location	Square Footage	Non-refundable Couple Entrance Fee	90% Refundable Couple Entrance Fee	Monthly Fee* Couple
Apt. 201	1227	\$182,479	\$291,967	\$3,284
Apt. 202	1108	\$164,782	\$263,651	\$3,090
Apt. 203	1159	\$172,366	\$275,786	\$3,173
Apt. 204	1259	\$187,238	\$299,582	\$3,336
Apt. 205	1204	\$179,059	\$286,494	\$3,247

Four of the five of the Amistad Apartments are available for reservation at this time.

Each apartment is allocated one carport space. The carport fee is an additional \$30.00 per month.

\*Monthly fee includes rent, residential fee, and dining fee.

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*Prices subject to change due to construction costs.*

# Norton Garden and Amistad Apartment Reservation Form

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Yes! I want to reserve one of the new Norton Garden or Amistad Apartments!

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip, Country \_\_\_\_\_

Home Phone \_\_\_\_\_

Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Preferred apartment number \_\_\_\_\_

(The following apartments are available: Norton Garden 102, 203, 204, and 205, and Amistad Apartments 201, 202, 203, 205.)

Upon sending this Reservation Form, I am stating that I wish to reserve one of the Norton Garden Apartments (anticipated occupancy December 2010) or Amistad Apartments (anticipated occupancy May 2011). I understand that by reserving an apartment at Norton Garden or Amistad, my name will be removed from the Pilgrim Place Housing List and I will not receive any offers for current housing on campus.

I understand that my opportunity to select an apartment location is based on the order in which I return this Reservation Form. If I am unable to secure my first choice location, I will have the opportunity to select another apartment.

\_\_\_\_\_ \$1,000.00 Reservation Fee enclosed  
Checks payable to "Pilgrim Place and Stewart Title of California, Inc."  
Attention: Escrow Agent

\_\_\_\_\_ Pilgrim Place Special Deposit Agreement document enclosed

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Date \_\_\_\_\_

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# Apartment 10% Entrance Fee Deposit Form

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Pilgrim Place is accepting Entrance Fee Deposits for Norton Garden and Amistad Apartments.

Name \_\_\_\_\_

Apartment number \_\_\_\_\_

Entrance Fee option selected \_\_\_\_\_

Total Entrance Fee \_\_\_\_\_

Entrance Fee Deposit Due \_\_\_\_\_

\_\_\_\_\_ 10% Entrance Fee enclosed with checks, draft, or money order payable to:  
"Pilgrim Place and Stewart Title of California, Inc."  
Attention: Escrow Agent  
This fee is equivalent to 10% of your selected entrance fee minus your \$1,000 Reservation Fee previously submitted.

\_\_\_\_\_ I have received a copy of the Pilgrim Place Special Deposit Agreement.

\_\_\_\_\_ I have received a draft copy of the Care and Resident Agreement. (A copy of the Care and Resident Agreement will be signed upon your entrance into Pilgrim Place.)

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_ Date \_\_\_\_\_

Signature (if applicable) \_\_\_\_\_

Printed Name \_\_\_\_\_ Date \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Please return this form and 10% Entrance Fee Deposit payment to Pilgrim Place by \_\_\_\_\_.  
A return envelope is provided for your convenience. Thank you.

**Pilgrim Place**

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