

The Bethel Methodist Home

Type C Disclosure  
Statement

September 2016

This matter involves a substantial financial investment and a legally binding contract. In evaluating the Disclosure Statement and the Residency Agreement prior to any commitment, it is recommended that you consult with an attorney and financial advisor of your choice, if you so elect, who can review these documents with you. You have the right to rescind the Residency Agreement within 7 days after signing without obligation.

The Bethel Methodist Home  
Continuing Care Retirement Community  
55 Grasslands Road  
Valhalla, New York 10595  
914/989-7800

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## DESCRIPTION

### Name and Type of Organization

The Bethel Methodist Home, Inc. (hereinafter “Sponsor”), located at 67 Springvale Road, Croton-on-Hudson, New York 10520, is a not-for-profit corporation organized and existing under the laws of the State of New York. Sponsor has received exemption from federal income taxes pursuant to Section 501(c)(3) of the Internal Revenue Code.

Sponsor is a wholly-owned subsidiary of BMH, Inc., a New York not-for-profit corporation (“BMH”). BMH and Sponsor have Common Board Members and BMH serves as the Common Parent of Sponsor and its affiliates. Sponsor is affiliated, through BMH as their common parent, with the following entities:

- The Bethel Springvale Nursing Home, Inc. (d/b/a Bethel Nursing and Rehabilitation Center), a New York not-for-profit corporation formed in 1995, operates a 200 bed skilled nursing facility located at 67 Springvale Road, Croton-on-Hudson, NY 10520.
- The Bethel Nursing Home Company, Inc., a New York not-for-profit corporation formed in 1970, operates a 43-bed skilled nursing facility located at 17 Narragansett Avenue, Ossining, NY 10562.
- Living Independently for the Elderly, Inc. (d/b/a The Springvale Inn), a New York not-for-profit corporation formed in 1981, operates a 125-bed Enriched Housing Program (EHP) located at 62 Springvale Road, Croton-on-Hudson, NY 10520.
- Angel Care Services Agency, a New York corporation, located at 67 Springvale Road, Croton-on-Hudson, NY 10520 offers supplemental nursing services.
- The Pines at Narragansett, Housing Development Fund Company, Inc., a New York not-for-profit corporation formed in 2003, operates an 50 unit independent living community located at 19 Narragansett Avenue, Ossining, NY 10562.

Finally, Springvale Operating Corporation, a New York corporation, is a wholly-owned subsidiary of Sponsor and is currently inactive.

These affiliates offer an established, successful continuum of care that has been providing home health care to the residents of Westchester County since 1920. Neither BMH nor any of these affiliates, other than Sponsor, run a continuing care retirement community and none are responsible for any obligations of Sponsor.

Sponsor has received a Certificate of Authority from the Continuing Care Retirement Community Council, which authorizes Sponsor to enter into Residency Agreements with prospective residents of The Bethel Methodist Home.

## Location and Description of The Bethel Methodist Home

The Bethel Methodist Home is located on a 29.5-acre parcel fronting on Grasslands Road in the Valhalla section of Greenburgh in Westchester County. This site is owned by Sponsor.

The Bethel Methodist Home is a continuing care retirement community designed to accommodate residents age 65 and older in 120 independent living apartments ranging in size from one-bedroom apartments to two bedroom/two bath apartments, 10 enriched housing apartments and 20 nursing beds. Each apartment has a kitchen. All of the apartments are constructed with the special needs of the elderly in mind. The Bethel Methodist Home has elevators for vertical transportation, lighting that reduces glare, floor coverings which are nonslip and firm underfoot, windows that are easily operated, door handles rather than knobs, individual apartment heating and cooling controls, and an emergency call for aid system which is monitored 24-hours per day. The Bethel Methodist Home also has common areas, such as the central dining room, a private dining room, a kitchen, activities areas, lobbies, an exercise center including an indoor pool, a convenience store, a café, library, guest suites, woodworking shop, auditorium, lounges, and administrative areas.

All facilities are constructed in accordance with all applicable building codes. The architecture emphasizes the residential character of the community and blends the community with the environment. Outside amenities include gardens, walking paths, and outdoor game areas.

## Services Provided

Prospective residents should fully understand the services that The Bethel Methodist Home will provide. A summary description of these services is attached as Exhibit I. The services are more fully described in the Residency Agreement that is attached and made part of this Disclosure Statement. If there are differences between this Disclosure Statement and the Residency Agreement, Sponsor is obligated to provide the services set forth in the Residency Agreement. Briefly, these services include (1) residency at The Bethel Methodist Home; (2) dining services for residents; (3) payment of utilities (except telephone) and basic cable television service; (4) independent living and enriched housing apartment maintenance; (5) maintenance of all common areas; (6) weekly flat linen service; (7) weekly housekeeping plus annual heavy cleaning; (8) scheduled transportation; (9) optional activities; (10) use of the exercise center including an indoor swimming pool and fitness center; (11) if required, skilled nursing home services charged to resident on a fee for service basis; (12) if required, enriched housing services charged to resident on a fee for service basis; (13) access to short-term and intermittent home health care as defined by and paid for by the Medicare program or by the resident directly through contract with a certified or licensed home health agency; and (14) various administrative services. In addition, The Bethel Methodist Home will provide access to physician services, prescription drugs and rehabilitation services.

## Board Members

Sponsor is governed by a voluntary Board of Directors. None of the Directors of Sponsor or any affiliated entity has any ownership interest in the assets of Sponsor. Directors take such actions and perform such duties and responsibilities as may be authorized by law and the Corporation's

by-laws. Copies of the by-laws are available upon request. No part of the net earnings of Sponsor may be used for the benefit of or be distributed to Directors or officers of Sponsor or any affiliated entity or other private individuals, nor does any person involved in the management of The Bethel Methodist Home have any proprietary interest in Sponsor. The voluntary Directors and officers of Sponsor are listed below. None of the Directors or officers of Sponsor or any affiliated entity has, as of this date:

- Been convicted of a crime or pled nolo contendere to a felony charge, or been held liable or enjoined in a civil action by final judgment if the criminal or civil action involved fraud, embezzlement, fraudulent conversion, or misappropriation of property.
- Had a prior discharge in bankruptcy or was found insolvent in any court action.
- Been subject to a currently effective order or federal or state administrative order relating to business activity or health care as a result of an action by a public agency or department, including, without limitation, actions affecting a license to operate a continuing care, health care, and/or adult care operation.
- Any interest in any supplier or potential supplier of goods or services to Sponsor.
- Supplied materials, goods or services of any kind to Sponsor.

Voluntary Directors serve without compensation. Their names and biographical summaries follow.

**James J. Campbell, Director**

James J. Campbell is the former Executive Director of Leake and Watts Services, Inc., a child care agency located in Yonkers, NY which provides services to over 3,000 children and their families. For over 30 years, Mr. Campbell has overseen agency operations which includes a 200 bed residential treatment facility, nine group homes, an early childhood education center, a special education center (grades 1-12), a juvenile detention-component and a number of community-based programs located throughout the Bronx. Mr. Campbell and his staff developed the first foster program in the United States for children affected by HIV.

Leake and Watts was also the first child care agency in NY to receive a \$50 million bond issue from the NYS Dormitory Authority to fund a five year construction project on the campus to provide additional and renovated facilities.

He has served on a variety of state and city committees and subcommittees related to human services. Mr. Campbell also serves as a board member for The College of Mount Saint Vincent, the Council of Family and Child Caring Agencies (COFCCA) the Westchester County Association and InterAgency council of Mental Retardation and Developmental Disabilities Agencies (IAC/MRDD).

**Rev. Dr. John E. Carrington, Director**

Dr. Carrington is an ordained clergy member of the New Annual York Conference of the United Methodist Church. He has been the Chairman of the Board of Trustees at New York Methodist Hospital since 1980, having first joined the board in 1968. In recognition of his years of service, the Hospital named the Carrington Pavilion in his honor in 1997. He has also been a trustee of the New York-Presbyterian Healthcare System.

He has served as the Executive Director and CEO of the United Methodist City Society for over 20 years and as a trustee of the New York Theological Seminary, and a director of Bethel Homes, Anchor House, the Brooklyn Methodist Home, and the United Hospital Fund of New York. He was a founding director of the Brooklyn Community Capital Bank and on the advisory board of Carver federal Savings Bank.

Dr. Carrington is a founder and honorary director of Harlem Congregations for Community Improvement, an interfaith organization that has provided more than 3,000 units of new and renovated housing in Harlem as well as social programs.

He has served as pastor of New Jersey churches in Westfield and Summit and two churches in New York City; Willis Avenue and Springfield Gardens. He is currently the senior pastor of two historic Manhattan United Methodist Churches, Mount Calvary and Saint Mark's which merged in 2015.

### **Andrew Samalin, Director**

Andrew Samalin has been advising affluent individuals, businesses and foundations since 1992 and is the principal of Samalin Investment Counsel, a SEC Registered Investment Advisory firm with offices in Westchester, NY and NYC. Prior to founding Samalin Investment Counsel, he held Senior Vice President - Investment positions at Morgan Stanley, Prudential Securities, and Wachovia Securities.

He received both his bachelors and masters degrees from New York University, and is a doctoral candidate in Management Studies at Pace University. He is also a CERTIFIED FINANCIAL PLANNER™ professional.

Mr. Samalin has served as a graduate-level lecturer at New York University for Real Estate Analytical Techniques under Professor Lawrence Fiedler and Adjunct Professor of Investment Management at Mercy College, Dobbs Ferry, NY.

In 2005, Wachovia Securities named him a "Premier Advisor," their highest tier of advisor. He was elected by the Westchester County Business Council to the Rising Stars: Westchester Forty Under Forty, 2007. Mr. Samalin was appointed Treasurer for Bethel Nursing Homes, named to its Executive Committee, and Chairs its Investment Committee. He is a Board Member of the Association of Divorce Financial Planners, and serves as the Editor-In-Chief of the monthly newsletter. In April 2007, he had the honor of hosting a reception on the floor of the New York Stock Exchange. Westchester Magazine voted Samalin Investment Counsel "Best in Customer Service" for both 2009 and 2010. Financial Advisor Magazine named Samalin Investment Counsel, LLC to its nationally-ranked listing of "Top 500 RIAs for 2010", SICounsel's first national award, as did Wealth Manager Web Magazine, also for 2010.

### **Catherine Wissner, MD, Director**

Catherine Wissner, MD is currently a Consulting Physician with Industrial Medicine Associates in White Plains, following a 39 year medical career which has included leadership positions in renowned hospital and health-related settings, teaching at a college of medicine and maintaining a private practice.

Dr. Wissner began her career at Montefiore Medical Center as an Attending Physician and also as a Hematology and Hemostasis Consultant for Surgical and Medical ICU, Cardiothoracic and Vascular Services.

During this time, she was also an Assistant Clinical Professor of Medicine at Albert Einstein College of Medicine.

She opened her private practice in 1993 and went on to hold key positions, simultaneously, in other hospitals and companies. These included Montefiore, Kaiser Permanente, Sound Shore Medical Center, Metropolitan Life, and NYS Veteran's Home, Montrose. Her positions ranged from Director of Geriatric Services to Chief of Internal Medicine, among others.

Dr. Wissner is the recipient of numerous awards, which include: the Joan Kornbloom Award for Excellence in Medicine- Hahnemann Medical College; the New York Medical College Award for Excellence in Teaching and the Brandeis University Learned Research Journal Award, among others.

### **Robert Elliott, Director**

Mr. Elliott served as the Mayor of Croton-on-Hudson from 1991 to 2005 and is a past President of both the Westchester Municipal Officials Association and the New York Conference of Mayors. Recently, he was the Deputy Secretary of State of New York State and prior to that was the Executive Director of the New York Planning Federation, which trains and provides technical assistance to municipalities across New York State.

Mr. Elliott is the founder and past Chairman of Historic River Towns of Westchester, an organization focused on waterfront development, tourism and main street economics. He has been the Director of Economic Development, as well as head of the Industrial Development Agency for Westchester County and was also President of the Westchester Convention and Visitors Bureau. He was one of the organizers and President of the New York Municipal Insurance Reciprocal, a corporation owned by, and insuring over, 600 counties, cities, villages and towns in New York State.

Currently he is a board member and Treasurer of both the Hudson River Foundation and the Glynwood Center and serves on a number of other boards including Hudson Valley Greenway Council, and its National Heritage Area Steering Committee, Center for the Study of the Environment and New Netherland Museum and Ship Half Moon. Previously, Mr. Elliott has served on a number of other boards including, NYS DEC'S Hudson River Estuary Management Plan Advisory Board, Clearwater and Friends of Hudson Valley.

### **Rev. Kevan Thomas Hitch, Director**

As a pastor in the New York Annual Conference of the United Methodist Church, Rev. Hitch has been appointed to several churches throughout the years including the Valhalla UMC where he has been the pastor since 2003. Other churches where Rev. Hitch has served include the New Paltz UMC, First & Summerfield UMC, New Haven, CT and Carpenter Memorial UMC in Glen Cove, NY.

In addition to his pastoral duties, Rev. Hitch's ministerial career has included working with the West Side Federation for Senior Housing as a Social Worker helping mentally ill persons from the NYC shelter system as well as serving as a Supervisor for the Columbia School of Social Work/Union Theological Seminary field education students.

Rev. Hitch's involvement in the community has covered a wide range of outreach, including: Founding Member, Hudson Valley Jobs for Justice; Clergy Leader, Elm City Congregations Organized; Founding Member, New Haven Community and Labor Coalition; Cooperative Ministry Taskforce, Methodists for Social Action; President, New York Methodist Federal Credit Union; and Board Member, Rural Migrant Ministry, NAACP, Glen Cove, among other outreach efforts.

He received a B.A. in English, Religion/Philosophy from Indiana Wesleyan University and a Master of Divinity from Princeton Theological Seminary

### **James Holden, Jr., Esq., Director**

James Holden, Jr., is a partner in the Holden Brothers Law Firm in White Plains, which his father, James Holden, Sr., co-founded in 1930. His father had served as the Secretary of Bethel's Board when he first joined in the 1950's and maintained that position until he retired from the board in 1985.

Mr. Holden was admitted to the bar in New York in 1976 and was admitted to practice before the U.S. Supreme Court in 1982. He is a member of the White Plains, Westchester County, New York State and American Bar associations.

Mr. Holden has served on the board of Camp Sloane, YMCA Inc. in Lakeville, CT and was the president of the camp's board for 13 years. He has also served on the board of the Hackley School Alumni Association, assuming the role of Secretary. He has also been a board member of the Portuguese Biomedical Research Foundation, Inc.

Mr. Holden is a graduate of Westminster College and New York Law School.

### **Management**

Sponsor is Manager of the Community.



## **RESERVES**

Under New York law, continuing care retirement communities are required to maintain liquid assets supporting reserve funds once the community becomes operational. Further, the regulations require maintenance of certain other reserves. Sponsor must demonstrate to the satisfaction of the Superintendent of Financial Services for the State of New York that it is maintaining all necessary reserves.

## **RESIDENT'S RIGHTS AND ORGANIZATIONS**

Under the Residency Agreement, residents have the right to self-organization and, among other rights, the rights to meet, use The Bethel Methodist Home's facilities, and receive information from Sponsor's management and Board of Directors, See Section *N* of the Residency Agreement for a description of these rights.

## **ANNUAL STATEMENT**

The Bethel Methodist Home will prepare annual financial statements, have those statements examined and certified by independent public accountants, make them available to residents upon request, and make the most recent financial statement available to prospective residents.

The following table summarizes the entrance fee and monthly fee for the Type C Residency Agreement by type of apartment as of the date of this Disclosure Statement:

**RESIDENT TYPE C CONTRACT FEES BY UNIT TYPE FOR CALENDAR YEAR 2016**

The Type C Contract is a modified contract providing nursing home care services and enriched housing services at the then current private pay rate for the applicable facility.

<u>Unit Type</u>	<u>Entrance Fee</u>		<u>Monthly Fee</u>	
	<u>Single</u>	<u>Couple</u>	<u>Single</u>	<u>Couple</u>
One Bedroom Traditional (Bayberry)	\$265,500	\$285,500	\$3,190	\$4,190
One Bedroom Deluxe (Elmwood)	375,500	395,500	3,790	4,790
Two Bedroom Traditional (Hawthorne)	440,500	460,500	4,750	5,750
Two bedroom Deluxe (Montgomery)	469,500	489,500	4,890	5,890
Two BR Deluxe-Bay Window (Whitney)	475,500	495,500	4,990	5,990
Two BR Deluxe/Dining (Knollwood)	530,500	550,200	5,490	6,490
Two BR Deluxe /Den/Solarium (Winthrop)	624,500	642,500	5,955	6,955

Entry fee refund/amortization details:

1. Fully refundable for first 90 days after resident’s occupancy date.
2. A 4% processing fee is charged after 90 days.
3. Also after 90 days, the first person and second person Entrance Fee refund is reduced by 2% per month.

Enriched Housing–Private Pay Monthly, beginning at: \$7,625 a month, plus service packages

The Bethel Methodist Home Skilled Nursing Facility-Private Pay Daily: \$450

The private pay rates are not regulated by the Department of Health or the Department of Financial Services, but are determined and implemented solely by The Bethel Methodist Home or such offsite care facility that the community may use.

## **EXHIBIT 1**

### **RESIDENT SERVICES**

Sponsor's obligation to provide services to residents is set forth in the Residency Agreement, which shall govern all such obligations. To assist residents in further understanding the services they will receive, the following service descriptions have been prepared. Unless otherwise noted, all services listed below are included in the fees paid by residents. This is a summary and not a substitution for the Residency Agreement.

#### Enriched Housing and Skilled Nursing Care

The Bethel Methodist Home has ten (10) enriched housing apartments. Residents who need assistance with the activities of daily living will receive such services in an enriched housing apartment. Residents who require chronic nursing care will receive such care in the skilled nursing facility. The resident will be responsible for the costs associated with the skilled nursing care or enriched housing services received. If the resident has not vacated the apartment, the resident will also pay the monthly fee in effect for the apartment. If one individual continues to reside in the apartment and the other individual is residing in the skilled nursing facility or enriched housing, the single person rate for the apartment will apply.

Residents who are enrolled in a health maintenance organization ("HMO") may have skilled nursing facility benefits available under the HMO subscriber contract. If the HMO and The Bethel Methodist Home cannot reach an agreement on appropriate financial arrangements, the resident may be required to transfer to a skilled nursing facility approved by the HMO in order to receive their benefits for skilled nursing facility services under the HMO subscriber contract. If the HMO and The Bethel Methodist Home cannot reach an agreement under appropriate financial arrangements, The Bethel Methodist Home resident may still choose to reside in the The Bethel Methodist Home skilled nursing facility. However, the resident will have to pay the Medicare per diem and any other expense that Medicare would have paid through the HMO.

The Bethel Methodist Home currently has twenty (20) skilled nursing beds. If those beds are filled or they are no longer available, the skilled nursing facility care provided under this Type C Contract may be provided at another skilled nursing facility preferably in close proximity to The Bethel Methodist Home.

#### Exercise Center/Indoor Swimming Pool

The Bethel Methodist Home includes an exercise center and an indoor swimming pool for residents and their guests.

#### Flat Laundry

Sponsor will provide weekly linen service. The resident's linen will be washed, dried, and folded. Such service shall include laundering the resident's sheets, pillowcases, towels, and face cloths. The use of permanent press fabrics is recommended, but not required. Staff will launder, but will not iron nonpermanent press items.

### Food Service

The number of meals included as part of the monthly fee shall equal the number of days in the month. Residents who eat additional meals will pay for those meals and will be billed for them monthly. Residents are required to pay for guest meals and will be billed for them monthly. Monthly fees will not be reduced for meals not taken unless the resident is absent for more than thirty (30) consecutive days, with prior notification.

Special diets for residents will be provided upon written orders signed by the resident's physician.

### Gratuities

No gratuities are allowed. Employees who accept them will be subject to discharge. Residents may choose annually to establish an employee appreciation fund to be shared with each employee on a basis determined by the residents and management.

### Home Health Services

Home health care services, provided by a certified home health care agency, as defined by and to the extent reimbursable under the Medicare program, to Residents of an Independent Living or Enriched Housing Apartment. Such services are intermittent and short-term in nature, typically rendered following an acute care illness. Residents who need assistance with the activities of daily living on a continuing basis may transfer to an Enriched Housing Apartment to receive such services. A Resident needing home care services in connection with a temporary condition beyond that covered by Medicare is responsible for the cost of such services and can receive such temporary services while a Resident of an Independent Living or Enriched Housing Apartment upon approval of the Medical Director. Residents have the option to select a home health care agency of their choice. If requested, Sponsor will assist the Resident in choosing an appropriate agency.

### Housekeeping Services

Sponsor will provide weekly housekeeping services. Housekeeping services will include cleaning and dusting the interior of the apartment, vacuuming, and washing and waxing of hard surface floors. Heavy cleaning such as windows and appliances will be done once each year. Rearranging of apartment furniture will be available at resident's expense. Extra cleaning help will be available at additional cost.

### Local Television

The cost of basic cable television service is included as part of the monthly fee.

### Maintenance of the Apartment

Sponsor will maintain all provided appliances, carpet, and fixtures for the resident as part of the monthly fee.

### Monthly Billing Service

All monthly fees are billed and placed in the resident's mailbox or other appropriate place on or before the first day of the month and are to be paid by the fifth day of the month.

### Other Insurance

Sponsor will carry insurance on its property, plant, and equipment. It will also carry liability insurance. This insurance **will not** cover the value of a resident's personal property or accidents occurring in a resident's apartment. Accordingly, residents will be required to insure themselves against loss of property and liability.

### Pet Policy

A resident shall be allowed to keep a pet at The Bethel Methodist Home provided (1) the pet does not disturb the neighbors; (2) resident disposes of pet's waste in appropriate manner; and (3) the pet is kept on a leash at all times when outside the independent living apartment. Only one pet belonging to a resident is allowed in an independent living apartment at any time. Resident assumes the responsibility for the full cost of repairing any damage done to The Bethel Methodist Home's facilities by the resident's pet. Guests visiting must request permission to bring a pet onto The Bethel Methodist Home's property.

### Prescription Drug Service

Residents of independent living and enriched housing apartments are responsible for providing their own prescription drugs. Arrangements have been made to allow for local pharmacy delivery. Transportation service to local pharmacies will be provided for the convenience of residents and to ensure residents have access to prescription drugs.

### Private Dining Room

A private dining room will be available for use by residents and their guests. Special meals will be available at an extra cost. Advance notice will be required.

### Reception Desk

A receptionist will be on duty twenty-four (24) hours per day/seven (7) days per week.

### Residents Association

The Board and Management of Sponsor will assist residents in maintaining a Residents Association. Regularly scheduled meetings will allow residents to ask questions and for the Board and Management to communicate with residents.

### Resident's Parking

Ample parking will be provided for each apartment. If a resident brings one or more automobiles to The Bethel Methodist Home, resident shall carry, at resident's expense, automobile insurance

in the amount of \$500,000 combined single limit. A limited number of covered parking spaces are available for the use of residents for an additional fee.

### Tax Matters

Under current provisions of the New York State and Federal tax code, residents may be allowed certain tax benefits. A percentage of the nonrefundable portion of the entrance fee and the monthly fee may qualify as a medical expense deduction. Early each year, Sponsor will provide the residents with the percentage of each fee that has been determined to be attributable to the provision of health services. A portion of a resident's fee may, under certain circumstances, be considered an interest-free loan. If so, there could be tax implications for the resident. Resident may find it advisable to consult with a tax professional to optimize resident's tax position.

### Telephone Service

Each apartment will have "live" jacks in at least two locations for connection to the resident's personal telephone. The cost of telephone service including both regular local service and long distance calls outside the assigned local calling area will be at the resident's expense.

### Transportation

Scheduled van or other transportation services will be provided. Special events transportation may be provided at extra cost to the resident.

Areas of regularly scheduled transportation will generally be limited to the Greater Westchester area. Included within this area are shopping centers and medical and other professional offices. Sponsor will provide scheduled transportation to places of worship within the service area.

### Utilities

Sponsor shall be responsible for payment of utilities, except for telephone service.

**EXHIBIT 2**

**THE BETHEL METHODIST HOME**

**TYPE C  
RESIDENCY AGREEMENT**