# CARLSBAD BY THE SEA

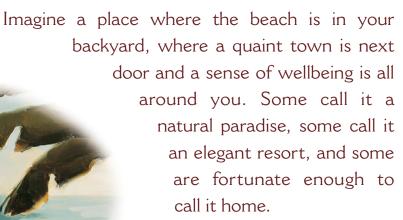
Retirement Community





# Somewhere between a sea and a village, simplicity and sophistication, privacy and community

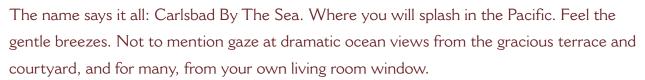
# is home ~ Carlsbad By The Sea.



Welcome to
Carlsbad By The Sea
Retirement Community.

# The shore meets your doorstep, and reality exceeds expectations.





With private beach access, sweeping vistas and well-appointed residences, you might rightly conclude that such amenities are enough-perfect. Yet, there's more. Also nearby are the shops, galleries, cafes and boutiques of Carlsbad Village. A pleasant stroll brings you to the heart of it all.



"A beach to run on,
a town to walk to"

Carlsbad By The Sea's

location just couldn't

be any better."

Welcome friends and family to your lovely home by the sea. Join them in an excursion to the Village Farmers' Market. Take a train ride to San Diego. Or stay local and treat them to gourmet coffee and bakery delights at an intimate eatery in town—or at your new favorite gathering place, the coffee bar at Carlsbad By The Sea.

Show them all there is to see and do when your neighborhood is Carlsbad Village and your backyard is the blue Pacific.



A history

of easy-going refinement

and personalized

Service continues.

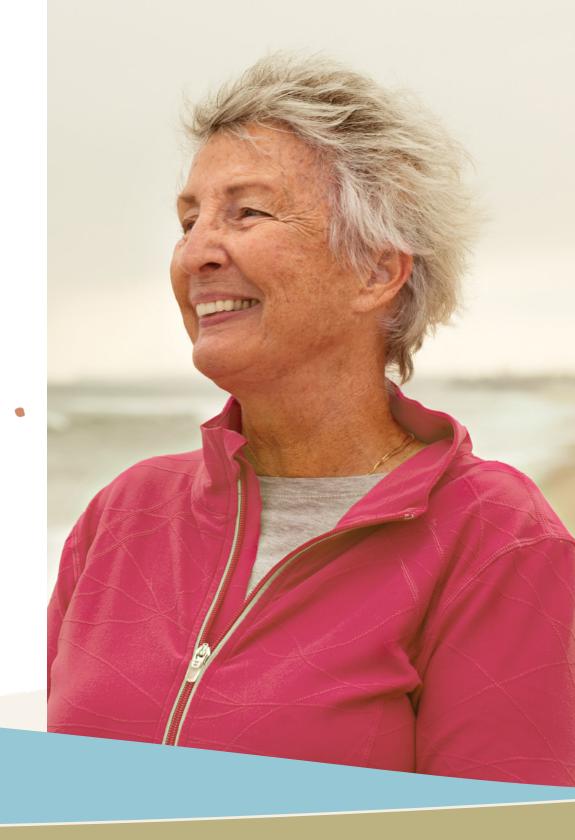
"Out on the patio.

On the beach.

In my lovely apartment.

Everywhere I go,

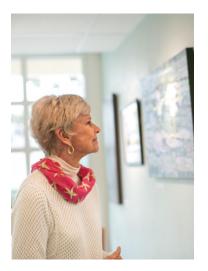
I feel right at home."



Carlsbad By The Sea has a long tradition of offering comfortable, resort-style living, dating back to its first incarnation as a prestigious health resort and spa in the 30s and 40s. And when the community was completely rebuilt as a retirement resort in 2000 its dedication to total wellbeing, a commitment to quality and a focus on service, were reborn. This commitment, along with its natural beauty, intimate grace and casual elegance, has made Carlsbad By The Sea one of the nation's first-class retirement resorts.

Here you will find a state-of-the-art Wellbeing Center with indoor therapeutic pool, outdoor recreational pool and spa services, including massage. Supporting our focus on wellness of mind, body and spirit is our community chaplain, who offers guidance for spiritual growth. Our Front Porch Gallery located next door features art pieces created by talented artists including our residents. A well-stocked library with Internet access keeps you in touch with the world as well as with friends and family. Many social opportunities give you the chance to learn and improve your woodworking, painting, bridge, billiards and dancing. Our weekly social hour is among one of the best attended events at Carlsbad By The Sea.

Perhaps most importantly, you will have the time to savor all that living in a vibrant community has to offer, thanks to our courteous staff who will take care of your weekly housekeeping, all indoor and outdoor maintenance, and the preparation of delicious menus in our celebrated dining room. Even getting a haircut or picking up some items you need for you and your home is quick and convenient with our on-site beauty salon and sundry store.







Spaces where you can

relax, entertain,
learn, play

and enjoy life.



Beautiful to look at and inviting to be in, Carlsbad By The Sea makes you and your guests feel right at home. After all, who wouldn't be seduced by the ocean panoramas; who wouldn't be tempted to take a stroll in the lushly landscaped courtyards; and who wouldn't be proud to entertain in a spacious and well-appointed residence.

Carlsbad By The Sea is an intimate community with fewer than 160 residences, including six premier oceanfront apartments built right into the bluff. Choose from more than 20 floor plans, with styles ranging from studios to penthouses and sizes ranging from more than 800 to 1,787 square feet, most with amenities such as fully equipped kitchens and washers and dryers. Patios or balconies expand your living space to take in the beautiful vistas and fresh ocean breezes.



"When you live at

Carlsbad By The Sea,

you are surrounded by

natural beauty and

wonderful friends."



If you can pull yourself away, head for our inviting common areas, situated and furnished to take full advantage of Carlsbad By The Sea's idyllic setting. If you are feeling energetic, work out in our specially designed fitness center, or take a dip in our sparkling pool. For a relaxing afternoon, find a shady spot on our patio and do some reading. Should you find yourself in the mood for lunch or a sunset walk, meet friends on our oceanfront terrace, where you can barbecue and have access to the most expansive and impressive common area of all, the beach.



# The search for your retirement community begins with a search of your heart...

Choosing the place—the right place—to retire can take some thoughtful consideration.

Certain criteria are easy to evaluate.

Freedom from home maintenance and household chores, the convenience of scheduled transportation, engaging neighbors and festive social events, the peace of mind of continuing care, the flexibility of preparing your own meals, eating out, or dining in the community's exceptional restaurant-style dining room—these are all, unquestionably, the appealing benefits of retirement living.

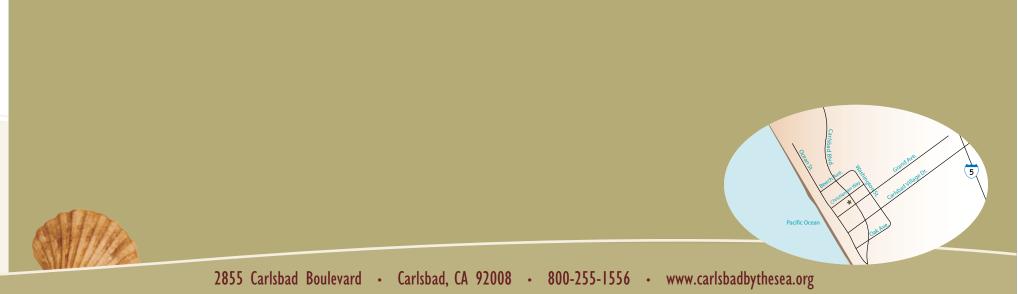
Other criteria, though less tangible, are nonetheless important to assess. Do you picture yourself remaining strong in body, mind and spirit? Do you appreciate culture and the arts? Do you want to forge new friendships and become involved with the community beyond the grounds of home? Do you find comfort in having access to three levels of care, including independent, assisted living, and skilled nursing? Do you like the idea of being part of a charming and vibrant village, far enough away from the big city to relish the peace and quiet, but close enough to stay connected and entertained?



Then perhaps

Carlsbad By The Sea

Retirement Community is for you.





#### CARLSBAD BY THE SEA

a front porch community

2855 Carlsbad Boulevard · Carlsbad, CA 92008 · 800-255-1556 · www.carlsbadbythesea.org



Carlsbad By The Sea is a Continuing Care Retirement Community featuring independent living, assisted living and skilled nursing. The community is licensed by the State of California. License #374600799. Certificate of Authority #194.

We are an equal opportunity housing provider.

# Carlsbad By The Sea Fee Schedule

Carlsbad By The Sea Retirement Community offers residences in a wide variety of sizes and styles. Within the following fee schedule, location, view and floor plans vary, and are considered in individual residence pricing.

FLOOR PLAN Studio 300 - 400 sq. ft.	ENTRANCE FEE Starting at \$119,000	MONTHLY FEE \$5,000
One Bedroom, One Bath Floor plan "A" 682 – 812 sq. ft. Floor plan "B" 861 sq. ft.	Starting at \$231,000	\$5,200 to \$5,400
One Bedroom, Den, One and One Half Bath Floor plan "D" 825 sq. ft.	Starting at \$296,000	\$5,600
Deluxe One Bedroom, One and One Half Bath Floor plan "H" 985 sq. ft.	Starting at \$391,000	\$6,000
One Bedroom, Den, Two Baths Floor plan "G" 1088 sq. ft.	Starting at \$354,000	\$6,100
Two Bedrooms, Two Baths Floor plan "J" 955 – 1058 sq. ft. Floor plan "L" 1100 – 1258 sq. ft	Starting at \$354,000	\$6,400 to \$6,800
Two Bedrooms, Den, Two Baths Floor plan "P" 1200 sq. ft.	Starting at \$599,000	\$6,700 to \$7,000
Two Bedrooms, Den, Two Baths Floor plan "A3" 1442 sq. ft. Floor plan "K" 1579 sq. ft.	Starting at \$623,000	\$8,100 to \$8,300
One Bedroom, Den, One and One Half Baths Oceanfront Floor plan "F" 1171 sq. ft.	Starting at \$789,000	\$7,600
One Bedroom, Den, One and One Half Baths Penthouse Floor plan "Q1" 1000 sq. ft.	Starting at \$654,000	\$8,130
Two Bedroom, Two Baths Penthouse Floor plan "U" 1214 sq. ft. Floor plan "Q2" 1236 sq. ft. Floor plan "N" 1519 sq. ft. Floor plan "T" 1667 sq. ft.	Starting at \$714,000	\$8,130 to \$8,400
Three Bedrooms, Two Baths Penthouse Floor plan "M" 1678 sq. ft.	Starting at \$789,000	\$8,855
Two Bedrooms, Den, Two Baths Oceanfront Floor plan "R" 1370 sq. ft. Oceanfront Floor plan "S" 1432 sq. ft. Penthouse Floor plan "W" 1425 sq. ft.	Starting at \$789,000	\$8,500 to \$10,000

There is a second person fee of \$1,600 per month.

Fees listed are as of April 1, 2023 and are subject to change.

Square footage is approximate.

Repayable entrance fee options available. Please contact our Sales Representatives for details.

## Your Monthly Service Fee Includes:

Flexible dining options

Weekly housekeeping, including change of linen service

Complete indoor, outdoor and grounds maintenance

Most utilities (local telephone, extended cable, water, electricity and trash)

Wireless Internet (WiFi)

Scheduled transportation

24-hour building and grounds security

24-hour emergency response system

Educational, social and recreational programs

Wellness and fitness center

Concierge services

Chapel and chaplaincy services

Resident technology assistant

Resident wellness monitoring services

Secured underground parking and storage

Care management and insurance billing coordination

Extra services available for a reasonable fee

Guest room accommodations

Meal delivery

Dry cleaning

Hair and nail salon

Masseuse

Personal training

Truly Yours assisted living and personal services available in all accommodations. Please inquire.

We're an equal opportunity housing provider.

CA Lic. 374600799 COA 194

#### Services & Amenities

Courtyard gardens and oceanfront terrace with beach access

Wide variety of floor plans, some with ocean views

Fitness center with therapeutic pool and spa

Lap pool for swimming, aerobics and water aerobics

Well-stocked library

Music, cultural and recreational opportunities

Beauty salon/barber shop

Fine dining with daily menu specials prepared by our executive chef

On-site educational courses

Resource Center with internet access

Gift shop

Coffee bar

Flexible restaurant-style dining program

Weekly housekeeping service

Indoor and outdoor maintenance

Concierge services

Full-time technology assistant

Secured underground parking and storage

Scheduled local transportation

On-site guest suites

Walking distance to shops, restaurants and services in Carlsbad Village

Local golf, area attractions and rail service

Easy access to mountains, desert and major metropolitan areas

**SMARTfit** 

Rapid rehab technology and S3 Balance System in the Brain and Balance Center

24-hour access to on-site continuing care

24-hour emergency response system available in all accommodations

24-hour electronic security surveillance throughout the community

Fitness and wellness programs

Spiritual growth programs and chaplain services

Extensive cultural and recreational opportunities



Welcome to personal assistance services delivered in the privacy of your home whenever practicable at Carlsbad By The Sea. Personal Services (P.S.) plans are based on your specific needs and service requirements.

PERSONAL SERVICES PLAN	<b>MONTHLY SERVICES FEE*</b>
P.S. "TLC Package"	\$630
P.S. Plan 1	\$1,575
P.S. Plan 2	\$2,600
P.S. Plan 3	\$3,790
P.S. Plan 4	\$4,100 and up

One-time service or short-term service packages are available. Some services (like escort services and medication management) might require separate fees. Please ask for details.

Fees listed are as of April 1, 2023 and are subject to change.

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<sup>\*</sup> Personal Services fees are added to your basic monthly fee.

## Live Life Your Way at Carlsbad By The Sea

Thank you for your interest in Carlsbad By The Sea where you can live life your way! We create community by believing in the individual. This is your retirement experience and we are here to help you create it. The Pacific Ocean is your backyard and we provide service and amenities in a resort-like retirement community. Carlsbad By The Sea gives you the freedom to spend your time as you choose, pursuing things that are most meaningful to you. Let us take care of the burden of cooking, housekeeping and maintenance.

Our dining experience is California Casual, and all dishes are prepared by our executive chef. All can be enjoyed with your friends on the ocean view patio, in the dining room or in the privacy of your home. Please take a look at the menu we have enclosed.

We agree with the research that states that residents of a multi-level or continuing care community live longer than seniors who live at home. This is attributed to the reduction of daily stresses and concerns, active companionship, mental stimulation, increased physical activity and better nutrition. We offer services and programs to support each of those facets.

Our Wellbeing Center includes a fitness area and a state of the art Brain and Balance Center. We are committed to your health and well-being so whether you choose personalized instruction or group classes you receive state of the art first class service. We are proud to feature SMARTfit, a gamified neuro-rehabilitation and fitness

technology to rapidly enhance cognitive function and physical mobility. To enhance balance, we have rapid rehab technology and a S3 Balance System in the Brain and Balance Center.

As a licensed continuing care retirement community, Carlsbad By The Sea offers additional care as you need it. The hallmark of our care is personal attention in warm, intimate surroundings where our staff knows vour likes and dislikes.

In addition to the supportive services offered through our wellness clinic or in the privacy of your own home, we offer two additional levels of care.

Truly Yours customized assisted living and personal services are available in all Carlsbad By The Sea residences. Fine dining choices as well as social, spiritual and recreational opportunities are offered to each resident at each level of care.

Carlsbad By The Sea Care Center offers 24-hour professional nursing. Rehabilitative therapies like physical, occupational and speech therapy, specialized restorative nursing programs and wound care are available. With 33 beds, our Care Center is known for its professional and personal care.

We would like to extend an invitation to you to visit our community, by calling 760-720-4580 or 800-255-1556 to schedule a personalized tour. Come and experience Carlsbad By The Sea where you can live life your way!

## Carlsbad By The Sea Recreation and Wellness Program

The Recreation and Wellness Program offers residents the opportunity to engage in activities, outings and fitness and health programs. We offer a comprehensive and innovative wellness program designed to educate and provide you with the tools necessary to achieve personal fitness and health goals.

Our goal is to create opportunities for helping YOU achieve optimal quality of life through intellectual, social, spiritual and physical components.

#### Recreation Program

This program offers a variety of excursions around San Diego and Orange counties such as theater, opera, symphony, museums, sporting events and more. In addition to off-campus trips, there are numerous events that take place right at home, whether it is our Friday social hour or celebrating a holiday, Carlsbad By The Sea is as busy as you want it to be. We also offer a wide variety of educational classes and seminars.

#### Amenities of the Spa Area

The fitness and spa areas consist of strength training equipment (Keiser), a SwimEx pool, various conditioning equipment, treadmill, Life Fitness Recumbent LifeCycle, outdoor Jacuzzi and massage therapy room. The fitness room is open 24 hours a day, seven days a week to all residents and is staffed Monday-Friday during normal business hours.

#### Personal Fitness

Fitness programs and routines are designed to help meet your personal health goals. In addition to personal training sessions, there are a variety of fitness classes available on campus including yoga, Pilates, aqua aerobics, circuit training, Tai Chi, balance classes and fall prevention.

Assisting Carlsbad By The Sea residents achieve their wellness goals is our objective. We look forward to joining you on your road to wellness. Remember, wellness is ageless. Be fit and be well.

## Sample Dinner Menu at Carlsbad By The Sea

#### Soup du Jour

New England Clam Chowder

#### Entrées

Artichoke Provolone Chicken Breast Artichoke Purée with Provolone Cheese

> Grilled Halibut Served with Fruit Salsa

Grilled New York Steak Served with Rosemary Au Jus

#### Accompaniments

Lyonnaise Potatoes Swiss Chard Cardamom Carrot Cauliflower and Brie Risotto Herb Butter Patty Pan Squash

#### Alternate Entrée Choices

Filet Mignon Omelet du Jour Poached Salmon Grilled Chicken Breast Seafood of the Day

#### Dessert

Chocolate Mousse Sugar-Free Raspberry Mousse Black Gold Cookies Linzer Torte Rocky Road Ice Cream Lemon Sorbet

Our dining experience is California Casual and all dishes are prepared by our executive chef. To perfectly complement your meal, we offer a wide variety of wine selections. All can be enjoyed with your friends on the ocean view patio, in the dining room or in the privacy of your home.

## Questions Commonly Asked About Carlsbad By The Sea Retirement Community

#### Q: What type of community is Carlsbad By The Sea?

A: Carlsbad By The Sea is a non-profit continuing care retirement community designed for seniors age 60 and over. Carlsbad By The Sea is licensed by the state of California. We're an equal opportunity housing provider.

#### Q: What size is Carlsbad By The Sea?

A: Carlsbad By The Sea houses 160 residences, that include six premier oceanfront accommodations, a 33-bed Skilled Nursing and Rehabilitation Center on-site and provides Truly Yours customized personal services available in all Carlsbad By The Sea residences. Carlsbad By The Sea offers spacious residences with 21 different floorplans ranging in size from approximately 800 to 1800 square feet. The three-story community is located on 3.8 acres of oceanfront property in Carlsbad Village. The intimate scale of the community allows our staff to provide personal service and care to the residents, including concierge services. In addition, there are nine elevators located conveniently throughout the community.

#### Q: What does my entrance fee cover?

A: Under the contract, we provide you with a home at Carlsbad By The Sea and access to continuing levels of care in exchange for your payment of the entrance fee and monthly service fee. An important aspect of the Carlsbad By The Sea continuing care contract is the on-site availability of care and service, including Truly Yours personal services delivered in your residence, hospice care and access to 24-hour in-patient rehabilitative or skilled care in our Medicare-certified Carlsbad By The Sea Care Center. The contract also includes use of all common areas such as our dining rooms, activity centers, oceanfront terrace, courtyard gardens and complete wellness and fitness areas.

#### Q: How do the refundable options for my entrance fee work?

A: Under all options, the entrance fee is refundable for the first 90 days of residency. This gives you the opportunity to make sure Carlsbad By The Sea is right for you. The refund under the "standard entrance fee" option quoted in your information packet decreases at a rate of 1.5 percent per month for 67 months down to zero. If you leave the community for any reason within that period of time, the entrance fee refund is calculated based on the amount of time you have lived in the community, in accordance with terms of your contract. Carlsbad By The Sea also offers a 50% and a 90% repayable option. Please contact our Sales Representatives to learn more about your options.

#### Q: What does my monthly service fee cover?

A: Your monthly service fee includes weekly housekeeping with change of linen service, a flexible meal credit program, most utilities (local telephone, extended cable, water, electricity and trash), indoor and outdoor maintenance, scheduled transportation, planned social and recreational activities including woodworking shop, art studio, a fitness and wellness program, chaplaincy services, concierge service, secured underground parking and storage, care management and benefit coordination, 24-hour emergency response, full-time resident technology assistant and on-site security service.

#### Q: What are the standard features in my residence?

A: Most residences have fully equipped kitchens including a refrigerator, dishwasher, garbage disposal, oven and microwave. Residences are also equipped with stacked washers and dryers and central air conditioning and heating. Emergency response systems and grab bars in the baths are standard in every residence. In addition, residences have high ceilings, crown molding and a private balcony or patio for residents to enjoy a variety of views including the beautifully landscaped courtyard gardens or magnificent ocean views.

#### Q: How does the dining service work?

A: Dining in our full-service restaurant-style dining room is based on a bank of meal credits. These credits will include more meals if used at lunch or breakfast. The dining program is designed to offer residents varied menu choices and flexible dining room hours. Residents also have the option of using their meal credits for visiting guests. If more meals are desired, residents may opt to be billed each month.

#### Q: What does the Village of Carlsbad have to offer?

A: Located in Carlsbad Village, Carlsbad By The Sea is within walking distance to local shops, restaurants, the Coaster train station, parks and medical offices. In addition, residents can enjoy leisurely walks along the miles of coastline while taking advantage of the year-round moderate climate. There are also many community activities including the bi-annual Carlsbad Street Faire, the world-renowned Flower Fields, the "Jazz in the Park" series and many other exciting cultural and entertainment events throughout the year.

#### Q: Am I allowed to have short-term guests in the community?

A: Absolutely. You may have friends or family stay with you or in our beautifully designed guest suites. Complimentary underground parking is also available for your guests.

#### Q: Do you allow pets?

A: Yes. We accept pets, however, the pet must be quiet, well behaved and in accordance with our pet policy, and there is a maximum number allowed.

#### Q: What are some common areas and activities?

A: Carlsbad By The Sea's focus is on healthy living and wellness. We have a fitness area and a spa where residents are able to enjoy massages or a swim in the therapeutic pool. Our outdoor exercise/lap pool is heated for residents to participate in regularly scheduled aqua fitness classes. Surrounding the spa/fitness areas are the clubrooms for painting, woodworking, billiards, bridge and games. We also offer a well-stocked library, educational courses and a resource center with computer access to the Internet. A unique feature of Carlsbad By The Sea is the ocean front terrace, a rooftop garden area overlooking the ocean where all residents are able to enjoy sitting areas, a barbecue and private access to the beach. It's a perfect place to enjoy the beautiful sunsets of Southern California and entertain guests.

#### Q: Do I pay for higher levels of care even if I don't need them?

A: The monthly fee quoted in your package refers to independent living services. At Carlsbad By The Sea, a resident pays only for the extra personal care they need, from 30 minutes to 24 hours, rather than paying an inclusive monthly fee when you are not receiving care. Truly Yours customized personal services can be delivered within the privacy of your residence at Carlsbad By The Sea. If you need the services of our Care Center, there are additional costs; however, the rates are reduced for our residents. The care that you receive at Carlsbad By The Sea may be covered by your health insurance or long term care insurance plan.

#### Q: What health and wellness services are available within my regular monthly fee?

A: Carlsbad By The Sea has a clear focus on wellness. Our staff is trained to help you live a healthful lifestyle. Among the benefits of living at Carlsbad By The Sea are the services of a nutrition expert who plans the meal service, an executive chef, a resident relations director, who among other things, will help you find resources in the community if desired, a care coordinator who will assist with temporary care needs and who will help with long-term insurance billing, a wellness nurse to monitor your blood pressure and weight if you wish, a recreation and leisure coordinator who will plan trips, events, concerts and cultural experiences both on site and off, a fitness expert, a concierge and a spiritual advisor (chaplain). All of these services are provided to you through your regular monthly fee.

#### Q: Can I sublet my residence at Carlsbad By The Sea?

A: No. Because we have signed a contract with you, the entitlements of the contract apply only to you, and cannot be sublet to anyone else. You can share a residence with another person, as long as they are qualified and enter into a continuing care contract with Carlsbad By The Sea.



#### Q: Will you help me figure out whether I qualify financially for residency at Carlsbad By The Sea?

A: Yes. Our Sales Representatives are always willing to answer any of your questions pertaining to the qualification process and the guidelines for acceptance to Carlsbad By The Sea. A simple formula you can use is this: you should have at least one-and-a-half times the amount of the entrance fee on your selected residence in your asset base, plus a monthly income equal to or greater than one-and-a-half times the estimated monthly service fee. Please call our Sales Representative if you have questions about your own circumstances and how they fit within these guidelines.

As a continuing care retirement community, Carlsbad By The Sea is governed by California law in how we qualify and execute continuing care contracts. These laws are established to protect you and the community so that we are able to meet our commitments to you now and in the future.

#### O: How do I know that Carlsbad By The Sea and Front Porch will be around to take care of me well into the future, and how do I know they will have my refund available to me?

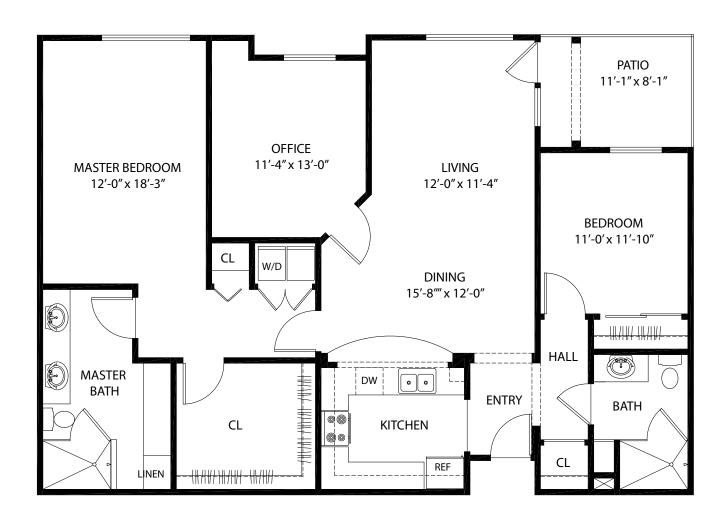
A: Carlsbad By The Sea has been providing continuing care contracts for over 50 years. Carlsbad By The Sea is licensed by the California Department of Social Services, which provides oversight of our operation and helps assure that we are able to meet our responsibilities to you. Our chief financial officer is available to answer additional questions.

Please call 760-720-4580 or 800-255-1556 to schedule an appointment or to contact our Sales Representatives for more information about Carlsbad By The Sea.



Rev: 4/23

#### Floor Plan A3

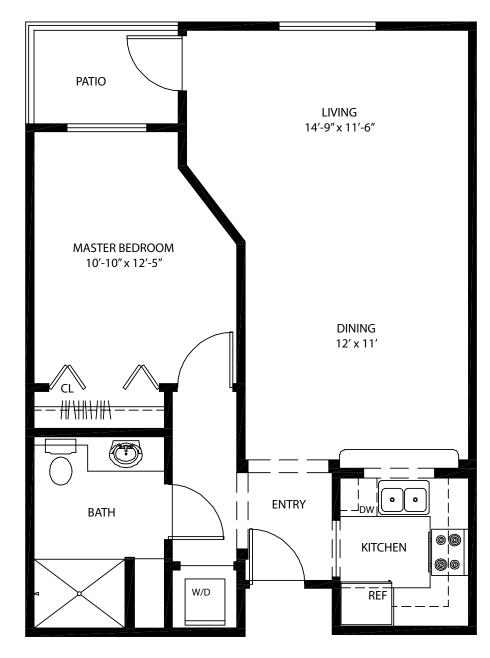


2 Bedroom/Office/2 Bath

1,442 Sq.Ft Patio: 88 Sq.Ft

# Popular Floorplans at Carlsbad By The Sea

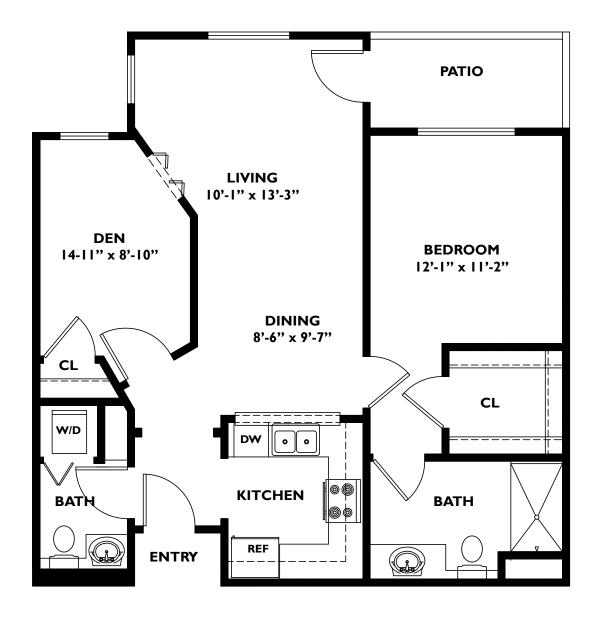
Floor Plan A



1 Bedroom/1 Bath 682 Sq.Ft Patio: 56 Sq.Ft

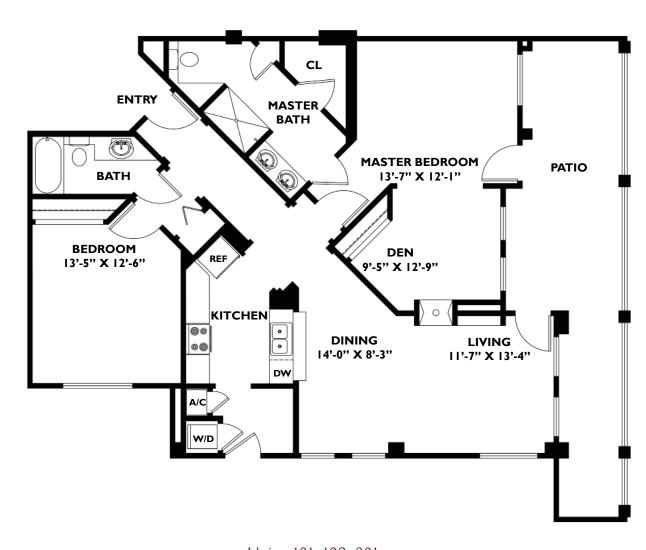
Not to Scale Not to Scale

#### Floor Plan D



1 Bedroom/Den/1.5 Bath 825 Sq.Ft Patio: 58 Sq.Ft

Floor Plan S



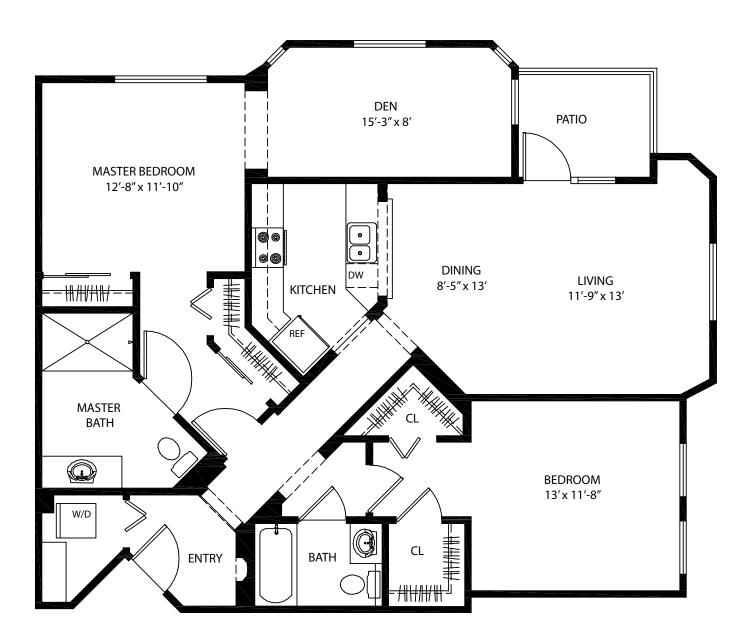
Units: 101, 102, 301

2 Bedroom/Den/2 Bath

1,432 Sq.Ft Patio: 300 Sq.Ft

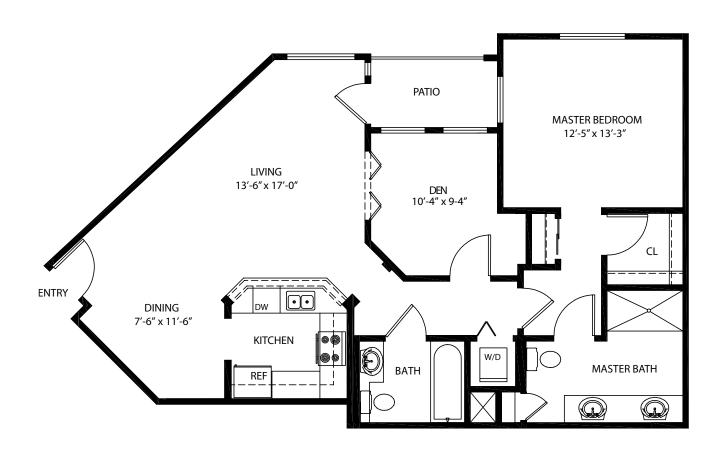
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Floor Plan P



2 Bedroom/Den/2 Bath 1,200 Sq.Ft Patio: 52 Sq.Ft

Floor Plan G



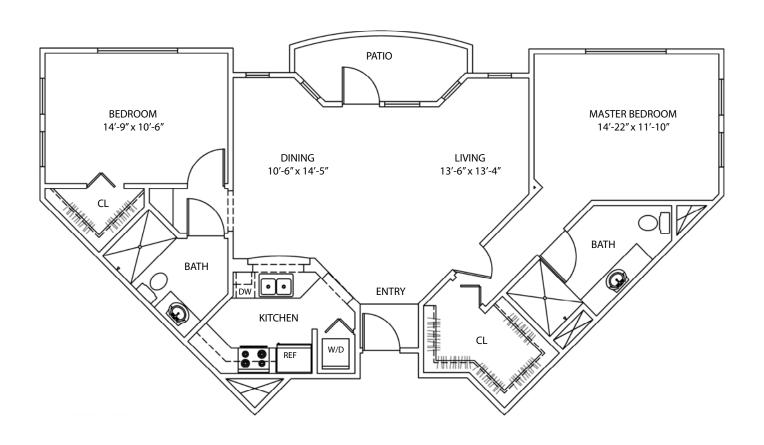
1 Bedroom/Den/2 Bath 1,088 Sq.Ft Patio: 46 Sq.Ft

Not to Scale

# Floor Plan J PATIO LIVING 14'-5" x 11'-6" MASTER BEDROOM BEDROOM 10'-10" x 13'-2" 9'-6" x 13'-9" DINING 12'-3" x 11'-6" ENTRY BATH MASTER BATH KITCHEN W/D 2 Bedroom/2 Bath

955 Sq.Ft Patio: 60 Sq.Ft

Floor Plan L



2 Bedroom/2 Bath 1,100 Sq.Ft Patio: 60 Sq.Ft

Not to Scale