Policy 104.1.1

Subject: Membership Guidelines

Purpose: To Clarify Guidelines for Membership

The Bylaws of Rossmoor Walnut Creek state that Membership is limited to, "one or more natural persons residing in a single manor, one of whom must be at least 55 years of age." Additionally, such Member must either be an owner of a Manor or shareholder of a cooperative, or a Designated Occupant. The Bylaws further define a Designated Occupant as one who resides in a Manor who has been designated by the applicable owner or shareholder, as an approved occupant in accordance with the requirements of the applicable Mutual.

Although RWC may not impose restrictions on ownership or occupancy, RWC has the authority to impose limitations on Membership in the RWC. Moreover, most, if not all, Mutuals require that individuals must be eligible for Membership in the RWC, in order to qualify for membership in a Mutual. Although the Bylaws of RWC predominate, the following is intended to supplement and clarify the requirements of the RWC Bylaws:

1. All occupants must be approved by the applicable Mutual in order to qualify for RWC Membership.

2. All prospective RWC Members must be approved by Rossmoor Walnut Creek.

3. The Waiver of Right to Use Community Facilities is required when the owner(s) of record will not reside in the Manor. Execution of that document establishes the non-resident owner is not a Member of RWC as to that Manor, and establishes the approved occupant as the Designated Occupant and Member of the Foundation for that Manor, pursuant to the Bylaws. Execution of the waiver does not create an exemption under Policy 102.1.4.C.1. A Designated Occupant who has not previously paid a Fee owes the Fee unless another exemption in Policy 102.1.4.C applies. Any later change in Membership is subject to Policy 102.1.4.

~~3. The execution of the Waiver of Right to Use Community Facilities document is required when the Member will not be the owner(s) of record. Execution of this document establishes the non-owner occupant as a Designated Occupant and Member of the Foundation, pursuant to the Bylaws of the Foundation. Execution of this document establishes conclusively that the owner is not a Member of RWC, and enjoys none of the privileges thereof. Any subsequent change to Membership will be subject to payment of any applicable Membership fee pursuant to Policy 102.1.4.~~

4. Each Membership must include at least one person who is 55 years of age or older.

5. Each Membership shall be limited to the number of residents per manor as prescribed by the applicable Mutual.

~~6.~~ For purposes of this Policy 104.1.1, a Co-occupant is defined as a natural person(s) included in an existing Membership by virtue of residing in a Manor along with a Member(s) who is either an owner occupant or Designated Occupant. No person may

be added to an existing Membership as a Co-occupant unless that person intends to occupy the Manor to which such Membership is appurtenant, which may be verified by acceptable proof of residence as determined by RWC.

~~7.~~6. All Co-occupants shall be registered by the Foundation as residing in the applicable Manor and may be required to pay a fee for such registration at the discretion of the Board of Directors. A schedule of any such applicable fees shall be maintained by Member Records and provided to Members upon request.

~~8.~~7. Only Co-occupants who have been properly registered are entitled to use of the community facilities.

9. Members, including Co-occupants, may be issued an identification card or other access devices, which may be subject to periodic renewal, and an administrative fee for issuance, renewal or replacement.

Authority: Policy

5/29/69
7/1/76 Rev.
1/1/85 Rev.
6/6/89 Rev.
2/28/13 Rev.
7/27/17 Rev.
10/26/17 Rev.
5/13/25 Housekeeping