

Investment Opportunity Deal

Willamette House is offering investors an exciting opportunity to participate in the rapidly growing residential assisted living market.





Overview

We plan to acquire and operate residential care homes that provide 24/7 care and support to individuals needing assistance with daily living. These homes will be strategically located in well-established communities, ensuring a comfortable and secure environment for our residents.

We are seeking an investment of:

\$500,000 in exchange for 50% equity ownership in the real estate and 20% equity ownership in the overall business operations.

Investment Highlights



- **Immediate Asset:** Your investment will be used to acquire real estate for residential care homes, which will be owned outright, with potential for property value appreciation over time.
- **Recurring Revenue Model:** The business will generate consistent revenue from monthly resident fees, including private pay clients and Medicaid waiver clients.
- **Scalable Model:** The business model is scalable, with plans for rapid expansion. Revenue and profits will increase as more homes are added to the portfolio.
- **Proven Market Demand:** The demand for residential care homes is increasing due to the aging population and the preference for home-like environments over traditional nursing homes.

The Deal Structure

Use of Funds

Overview:

- **Real Estate Acquisition:** Funds will be used to acquire homes in prime locations and make necessary modifications to meet health and safety regulations and ADA standards.
- **Home Modifications:** Renovations will ensure the homes are fully ADA-compliant and suitable for assisted living, including necessary safety features and accessibility adjustments.
- **Operational Costs:** Marketing, recruitment of caretakers and staff, and initial operating expenses to launch each home and bring in clients.

Capital Needed

\$500,000

50% Equity Ownership in each residential home acquired.

20% Equity Ownership in the overall business operations, giving investors a stake in all homes and ongoing revenue streams.

Revenue Projections

Average Monthly Billing
per Resident
\$11,174

Client Mix:

18 Medicaid Waiver Clients

3 Private Pay Clients

Projected Earnings for One Home in 2025

Annual Revenue per Home

\$900,000

Net Profit (25% margin)

\$225,000

Total Projected Profit for 4 Homes

\$900,000 annually

Investor Returns



Equity Ownership

- Investors will own **50% of each home and 20% of overall business operations**, entitling them to a share of profits generated across the entire business portfolio.
- Investors are projected to receive **25% of the net profits** from each home. This translates to approximately **\$225,000 per home** in annual profit.
- As additional homes are acquired and the business grows, the return on investment increases proportionally.

Equity Distribution Based on Individual Investment Amounts

We are open to accepting partial investments from multiple investors. Each investor will receive equity in proportion to their contribution. Below are some examples of how equity will be distributed based on the amount invested:

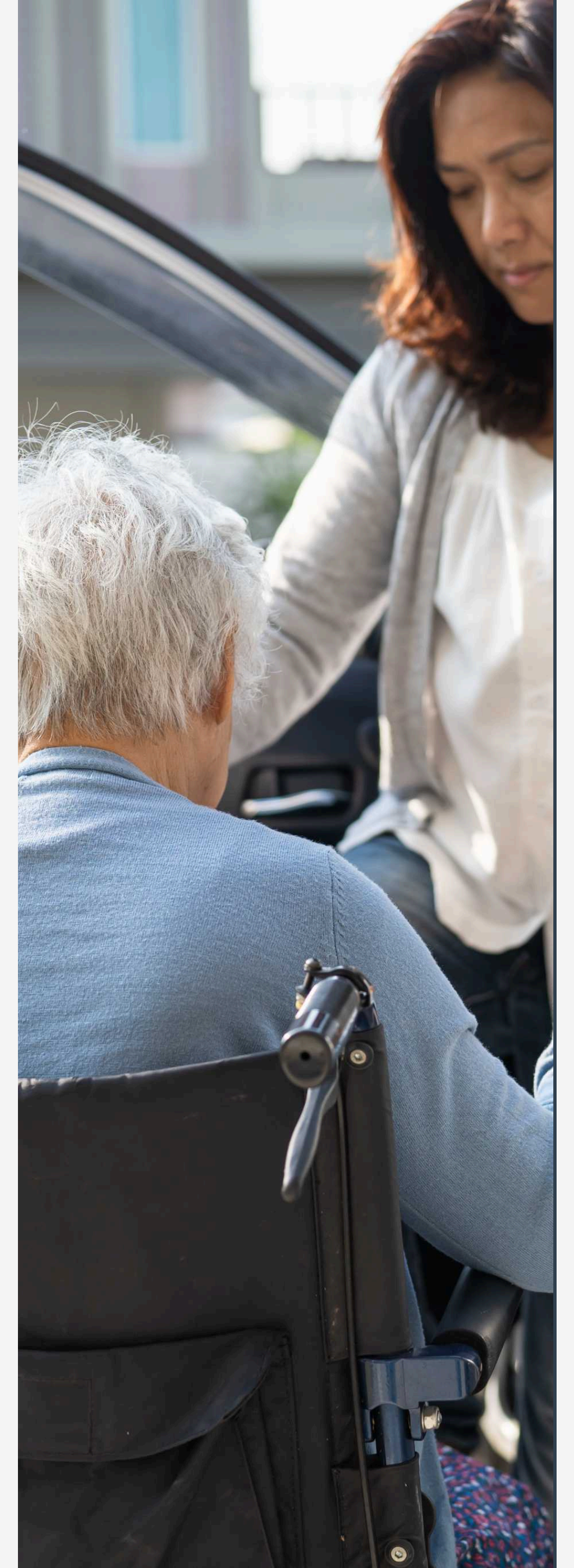
Example 1 - Investor with \$75,000 Investment

Real Estate Equity: 50% of the real estate equity will be distributed based on the proportional investment. For a \$75,000 investment:

- **50% Real Estate Equity Share** = $\$75,000 / \$500,000 = 15\%$ ownership in real estate.

Business Operations Equity: 20% of the equity in business operations will also be distributed in the same way. For a \$75,000 investment:

- **20% Business Operations Equity Share** = $\$75,000 / \$500,000 = 3\%$ ownership in business operations.



Total Equity for \$75,000 Investment

15% ownership in
real estate

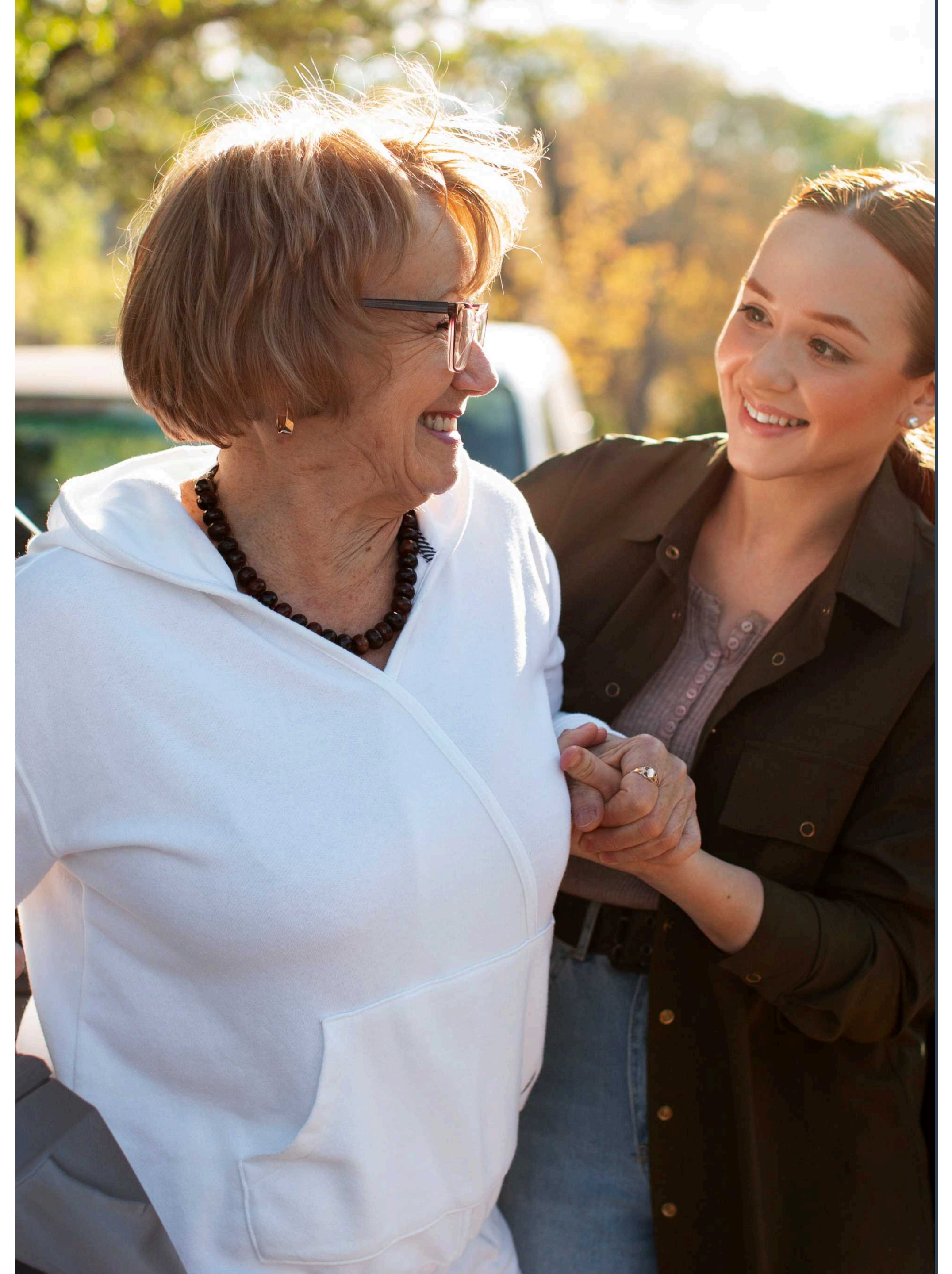
3% ownership in
business operations

Total

18% combined equity

Passive Income Stream

- **Ownership in Operations:** Investors will begin receiving passive income from the **20% equity ownership in the business operations**, even before any exit event occurs. This provides a continuous income stream as the homes become operational and begin generating revenue.
- Monthly and quarterly distributions from the operating profits will provide a steady cash flow, making this an attractive investment for those seeking income in addition to long-term appreciation.



Exit Strategy

- The business is designed for long-term growth and profitability. Potential exit strategies include a buyout by a larger company in the senior care or real estate sector, or the sale of the homes and operations at a higher valuation in 5-7 years.
- Alternatively, investors can continue to receive passive income from operations, even if they choose not to exit the business. The business is built for sustainability and ongoing profitability.



Why This Is a Great Opportunity?

- **Growing Market:** The senior care market is one of the fastest-growing industries, driven by the aging population and increasing demand for residential care homes.
- **Steady Cash Flow:** The combination of consistent monthly billing from residents and multiple revenue streams creates a reliable and growing cash flow for investors.
- **Appreciating Assets:** As we acquire real estate for the care homes, the properties will appreciate over time, further increasing the value of your investment.
- **Scalable Model:** The opportunity to scale by acquiring additional homes means increasing returns. Each new home added to the portfolio will significantly boost overall profitability.

Next Steps

- **Investment Commitment:** We are ready to proceed with property acquisitions immediately upon securing funding.
- **Due Diligence:** Investors will have full access to detailed financials, operational plans, and property acquisition documents for a comprehensive due diligence process.
- **Timeline:** The first home acquisition will take place within **30-60 days** of funding, with operations expected to begin within **90 days** of securing the investment.

**For more details or to
schedule a meeting,
please contact:**

George Odoi

godoi@bosstransport.org



Marketing Plan





Objective

The objective of this marketing plan is to increase visibility, generate qualified leads, and position Willamette House as a trusted provider of high-quality residential care services.

Our marketing efforts will be aimed at building brand awareness, establishing authority in the senior care market, and driving inbound traffic to our website, leading to consultations, tours, and new resident sign-ups.

Key Marketing Assets and Team Structure

- **Website:** We have already built a user-friendly, fully optimized website that showcases our services, care options, and the unique benefits of living in Willamette House. This serves as our central hub for all marketing efforts.
- **Marketing Partner:** We have partnered with Media Pop, a full-service marketing agency, to handle all aspects of digital marketing, advertising, and PR. This partnership ensures that our marketing strategy is executed efficiently, leveraging industry expertise.
- **Brand Identity:** Our brand identity, including a modern logo and consistent visual style, has been established to reflect our values of compassion, trust, and excellence in senior care.
- **Marketing Lead:** *Emanuela Pop, our Chief Marketing and Investment Officer,* leads the marketing strategy and implementation efforts. With her extensive experience in marketing and business development, Emanuela is responsible for driving all marketing activities and ensuring alignment with our growth objectives.

Website Development & Optimization

Purpose

The website will serve as the primary digital touchpoint for potential residents and their families. It must be informative, easy to navigate, and optimized for conversions.

Key Features

- **User-friendly Design:** Clean, simple design optimized for both desktop and mobile users, with a focus on accessibility.
- **Service Information:** Detailed descriptions of our services, including 24/7 care, memory care, rehabilitation, and specialized care for residents with varying needs.
- **Client Testimonials:** Showcase stories from current residents and their families to build trust and credibility.
- **Virtual Tour:** A video or interactive 360-degree virtual tour of the home, helping families envision the environment and the quality of care provided.
- **Contact Forms:** Simple forms for scheduling tours, requesting more information, or booking a consultation. Clear CTAs (calls to action) throughout the site to encourage conversion.
- **SEO Optimization:** Fully optimized for local SEO, targeting key search phrases such as "assisted living in [City Name]" or "senior care homes near me."

Website Development & Optimization

Action Steps

- Continue optimizing the website for both SEO and user experience, with ongoing updates to content and structure.
- Leverage Media Pop's expertise in SEO to ensure we rank for the most relevant and high-traffic search terms in the senior care market.

Social Media Strategy

Purpose

Build a community, engage with families, and share content that promotes trust, care, and our unique offerings.

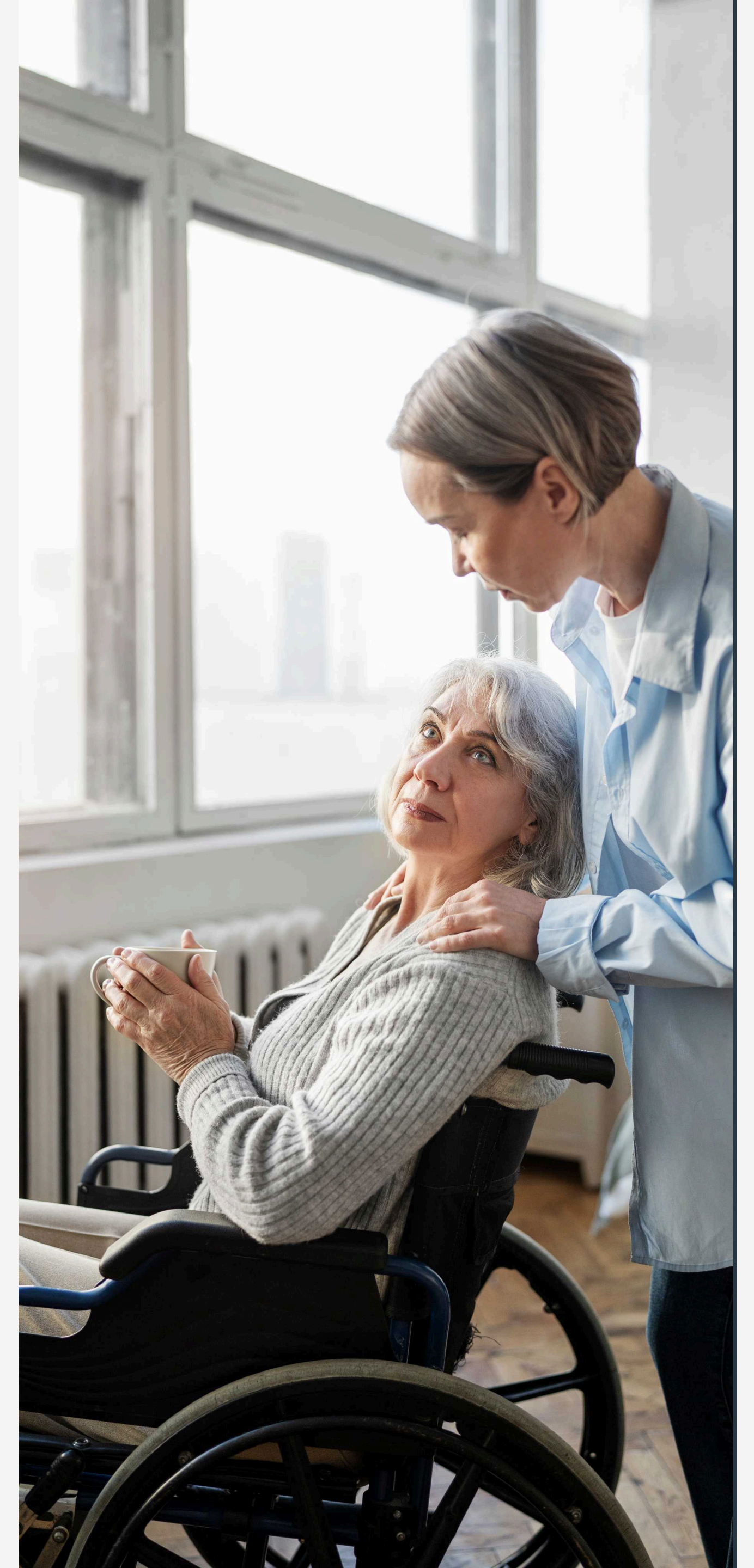
Platforms to Focus On:

- **Facebook:** Perfect for targeting families of seniors, where we can post regular updates on services, resident activities, caregiver tips, and news about our homes.
- **Instagram:** Showcase images and videos of our homes, residents, staff, and activities to build an emotional connection.
- **LinkedIn:** Focus on building our reputation in the senior care industry and networking with healthcare professionals, social workers, and case managers.
- **YouTube:** Post video content such as home tours, resident testimonials, and educational videos on senior health.

Social Media Strategy

Content Plan

- **Weekly Posts:** Engaging posts, including:
 - Success stories and testimonials from residents and their families.
 - "Day in the Life" of residents and staff.
 - Health tips for seniors, care options, and caregiver advice.
 - Photos and videos from events, resident outings, and social activities.
- **Paid Social Media Ads:** Use Facebook and Instagram Ads to target family members of seniors looking for care, showcasing the warmth, comfort, and professionalism of our homes.
- **Instagram Stories & Reels:** Engage followers with short, engaging videos that highlight daily life, staff interviews, and resident care routines.



Social Media Strategy

Action Steps

- Leverage Media Pop's social media expertise to create a robust content calendar and manage posting schedules.
- Use paid advertising on Facebook and Instagram to increase reach and drive traffic to the website for consultations and tours.

Paid Advertising

(Google Ads & Social Media Ads)

Purpose

Use paid advertising to drive targeted traffic to the website and encourage conversions (tours, consultations, inquiries).

Google Ads:

- **Targeting:** Focus on geo-targeting to reach families in the local area who are searching for terms such as “best assisted living near me,” “memory care in [City Name],” or “senior care homes in [City Name].”
- **Ad Extensions:** Use phone number, location, and sitelink extensions to drive calls and conversions.
- **Remarketing:** Target previous visitors to our website with ads that encourage them to return and schedule a tour or request more information.

Facebook & Instagram Ads:

- **Target Audience:** Families with elderly parents or loved ones in need of care.
- **Types of Ads:**
 - **Carousel Ads:** Showcase images of the home, rooms, staff, and services offered.
 - **Video Ads:** Use testimonials or behind-the-scenes footage to highlight the care and attention our residents receive.
 - **Lead Generation Ads:** Create ads that encourage users to fill out forms directly from the ad, offering consultations or informational brochures.

Paid Advertising

Action Steps

- Work with Media Pop to develop targeted Google Ads and social media campaigns.
- Continually optimize ad performance by testing different messaging, creatives, and targeting.

Public Relations (PR) & Community Engagement

Purpose

Increase visibility in the local market, build credibility, and position Willamette House as a leader in the senior care space.

Local Newspapers & Magazines:

- **Press Releases:** Distribute press releases about new home openings, milestones, resident success stories, and partnerships with healthcare providers.
- **Editorial Opportunities:** Pitch stories about the growing need for quality residential care, our personalized care approach, and the benefits of residential-style care over traditional nursing homes.
- **Local Coverage:** Work with Media Pop to pitch stories to local media outlets, including newspapers, radio stations, and magazines.

Community Outreach:

- **Open Houses:** Host events for families to tour the homes and meet the staff. Promote these events through social media, local newspapers, and email newsletters.
- **Event Sponsorships:** Sponsor local senior events, health fairs, or charity runs. Partner with local hospitals or elder law firms for co-branded events.
- **Partnerships:** Build referral relationships with local healthcare professionals, case managers, and social workers. Offer incentives for professional referrals.

Public Relations

Action Steps

- Coordinate with Media Pop to develop press releases and pitch story ideas to local publications.
- Schedule and promote open house events through media channels and social media.

Reviews & Testimonials

- **Google Reviews:** Encourage satisfied families and residents to leave reviews on Google, improving SEO and building social credibility.
- **Yelp:** Set up a Yelp page to allow families to share experiences and leave positive reviews.
- **Video Testimonials:** Create short, impactful video testimonials from residents and families to post on the website and social media.

Purpose

Build trust through social proof, driving new families to choose Willamette House.

Action Steps

- Use Media Pop's strategy to increase online review presence.
- Offer incentives for families to leave reviews and testimonials.

Referral Program

- **Incentives:** Provide small gift cards, service discounts, or charitable donations for successful referrals.
- **Partnership Referrals:** Build a referral program with local hospitals, physicians, and elder law firms to encourage cross-promotions.

Purpose

Encourage existing residents, their families, and employees to refer new clients to Willamette House.

Action Steps

- Work with Media Pop to create a referral program that is easy to promote both online and in person.
- Promote the program through newsletters, social media, and on-site visits.



● HAPPY PEOPLE FOR LONGER

Reinventing Senior Living

Choosing The Willametta House means choosing a trusted partner in senior care. We are honored to be a part of our client's lives, supporting them in their journey and making a positive impact on their overall well-being.

[Get in Touch](#)



● OUR SERVICES

These Services Aim To Enhance The Quality Of Life Of Seniors



Health monitoring

Utilizing technology and remote monitoring systems to track vital signs, medication adherence, and overall health status, providing peace of mind to both seniors and their families while enabling early detection.



Transportation services

Assisting seniors with transportation to medical appointments, social outings, grocery shopping, and other daily errands, ensuring they can remain engaged and connected with their community.



Memory care

Process of designing, c...

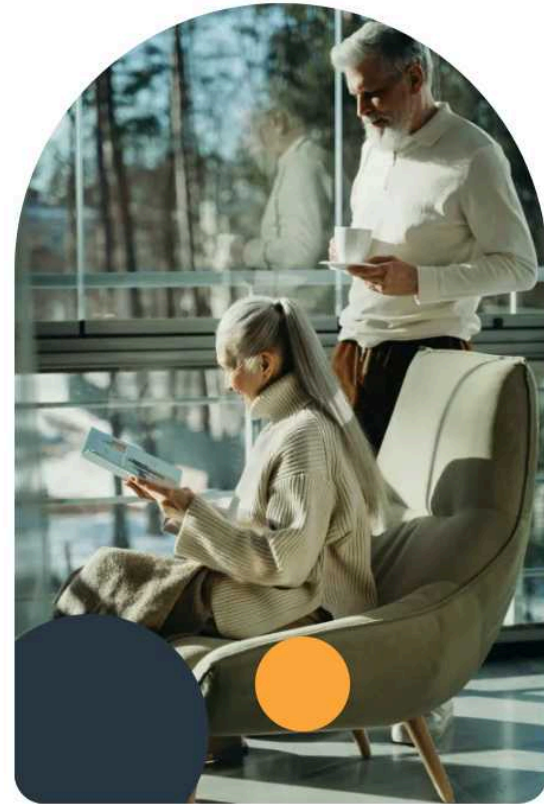
● ABOUT US

We Believe In Treating Our Clients With Dignity

At The Willametta House, we've created a warm, family-like environment where compassionate care and personal attention guide everything we do.

Our mission is to offer older adults the comfort, respect, and support they deserve, so they can feel at home in their daily lives.

[More About Us](#)



● REAL NUMBERS

We Deliver The Highest Quality Home Care

With years of experience in The Willametta House industry, our professionals are committed to delivering personalized care tailored to the individual we serve.

23

Years Experience

Our team of caregivers and professionals provides personalized care.

45K

Satisfied Clients

We believe in treating our clients with respect, fostering a sense of trust.

120

Professionals On Staff

We understand the importance of involving families in the care process.

● WHY CHOOSE US

Our Senior Care Services Are Backed By Years Of Experience

Choosing us means entrusting the care of your loved ones to a dedicated and experienced team that prioritizes their well-being, offers personalized support, and upholds the highest standards of quality and safety.



● Experience and Expertise

Our senior care services are backed by years of experience from trained professionals. We understand the unique needs of seniors and have developed specialized expertise to provide personalized care.

Subscribe to our Newsletter!

For more information or to schedule a tour, contact a sales consultant who can help you decide which community.

Your email address

[Subscribe](#)

Online Booking For Appointments

Choosing Senior Care means choosing a trusted partner in senior care. Contact us today to learn more about our senior care services.

Full name

Email

Phone number

Company

Message

[Submit](#)

● FROM THE BLOG

Informed And Inspired



The importance of socialization for seniors

Promoting Connection and Well-being: This blog post can discuss the significance of social interaction for seniors.

[Read Article](#) →



A guide to choosing the right care facility for your loved one

This post can provide guidance to families seeking memory care options for their loved ones.

[Read Article](#) →



Healthy aging: tips for seniors to maintain a balanced lifestyle

This blog post can offer practical advice on healthy aging, covering topics such as nutrition, exercise.

[Read Article](#) →



Home About Us Faq's Services Contact Us

Reinventing Senior Living

HAPPY PEOPLE FOR LONGER

Choosing The Willamette House means choosing a trusted partner in senior care. We are honored to be a part of our client's lives, supporting them in their journey and making a positive impact on their overall well-being.

Get in Touch



With Media Pop as our marketing partner, Emanuela Pop leading the charge as our Chief Marketing and Investment Officer, and a comprehensive marketing strategy already in motion, **Willamette House is poised for growth.**

We are leveraging digital and traditional marketing channels, community outreach, and industry partnerships to establish ourselves as a leading provider of residential care. Through ongoing marketing efforts, we aim to drive consistent leads, build our brand reputation, and continue expanding our presence in the senior care market.



Use of Investment to Secure Real Estate





The investment funds will primarily be allocated to securing real estate for the operation of Willamette House’s residential care homes.

The acquisition of real estate is a critical first step in launching our care homes and will form the foundation of our business, providing long-term value and stability.

Here's a detailed breakdown of how the investment will be used:

Real Estate Acquisition

The core use of the investment will be to purchase residential properties in strategically chosen locations. These properties will be transformed into fully operational assisted living homes, specifically designed to cater to the needs of elderly residents.

Goal

Secure 3-5 homes in our initial phase, each carefully selected to meet both the needs of our residents and our operational requirements.

- **Target Locations:** The homes will be located in well-established communities, ensuring that we are near healthcare facilities, public services, and family members of our residents.
- **Property Selection Criteria:** We will prioritize properties that:
 - Are in safe, quiet neighborhoods with access to local amenities like hospitals, parks, and shopping centers.
 - Have enough square footage to accommodate a reasonable number of residents per home (1 client per room) while ensuring ample common space for socialization and activities.
 - Are within budget but have strong potential for appreciation over time.

Property Renovations and Modifications

Once the real estate is acquired, renovations and modifications will be made to ensure that each home is compliant with all necessary safety and health regulations, as well as being ADA-compliant for accessibility.

Goal

Transform each home into a safe, functional, and comfortable environment that will enhance the quality of life for residents while meeting regulatory standards for assisted living.

Key Renovations

- **Room Adjustments:** Bedrooms will be modified to ensure safety and comfort, including installing handrails, non-slip flooring, and accessible bathrooms.
- **Common Areas:** Living rooms, dining areas, and activity rooms will be designed to be both welcoming and functional, offering spaces for socialization, recreation, and group activities.
- **Safety Features:** Install security systems, emergency exits, fire alarms, and other essential safety measures.
- **Specialized Care Areas:** Depending on the home, certain areas may be adapted for specialized care services such as memory care, physical therapy, or rehabilitation.

Legal, Administrative, and Compliance Costs

The investment will also cover legal, administrative, and compliance costs associated with acquiring real estate for the care homes.

- **Title Search & Closing Costs:** Fees related to the closing of real estate transactions, including title searches, legal fees, and insurance.
- **Licensing & Certification:** Obtaining the necessary licenses and certifications from state and local authorities to legally operate residential care homes.
- **Zoning Compliance:** Ensuring that the properties are zoned for residential care use and conform to all local regulations related to senior housing.

Goal

Ensure that all properties are legally compliant, with all permits, licenses, and certifications obtained to operate as residential care homes.

Long-Term Value & Asset Appreciation

Real estate is a tangible, appreciating asset. By investing in properties now, we are setting the foundation for the long-term value of Willamette House.

- **Asset Appreciation:** The properties we acquire will likely appreciate in value over time, providing us with an appreciating asset that will increase in value.
- **Equity Growth:** As the properties increase in value, the equity in the real estate will grow, increasing the overall value of the business.
- **Exit Strategy:** When it comes time to exit or sell the business, the appreciated value of the real estate assets will form a significant part of the overall sale price, providing a substantial return on investment.

Goal

Maximize the long-term value of the real estate portfolio, benefiting investors both through immediate operational income and future appreciation.

Working Capital for Operations

While the bulk of the investment will be used for real estate acquisition, a portion will be allocated for working capital to cover initial operational costs, including:

- **Renovation Costs:** Ensuring homes are fully ready for residents.
- **Staff Recruitment:** Hiring qualified caregivers, support staff, and management personnel to operate the homes.
- **Initial Marketing and Outreach:** Funding marketing efforts to attract prospective residents and build awareness of our services.

Goal

Ensure that all properties are legally compliant, with all permits, licenses, and certifications obtained to operate as residential care homes.

Summary of Investment Allocation

- **Real Estate Acquisition:** The largest portion of the investment will go toward purchasing residential properties in prime locations.
- **Property Renovations and Modifications:** To create safe, ADA-compliant, and comfortable homes.
- **Legal and Compliance:** Ensuring all properties meet state regulations and have the required licenses and permits.
- **Working Capital:** To cover operational startup costs, including staffing, marketing, and other initial expenses.
- **Long-Term Value:** The properties will appreciate in value over time, creating a substantial asset base for the business and its investors.



Team for Willamette House Project



George Odoi

Chief Executive Officer (CEO)

Expertise

Business Leadership, Healthcare Operations, Strategy, and Community Development

As the CEO of Willamette House, George Odoi will lead the overall vision and strategic direction of the company.

With a wealth of experience in business operations and community services, George will focus on establishing Willamette House as a leader in residential care. He will oversee the acquisition and development of real estate, regulatory compliance, and long-term growth of the business.

Key Responsibilities

- Developing and executing the business strategy.
- Leading and managing senior leadership and operational teams.
- Overseeing fundraising, investor relations, and partnerships.
- Ensuring regulatory compliance and licensing for all care facilities.

William Woods

Co-Founder and Partner

Expertise

Operations Management, Financial Strategy,
and Investor Relations

As a Co-Founder and Partner, William Woods will bring deep expertise in financial strategy and operations management.

His role will focus on ensuring the financial stability and efficiency of the business, particularly in managing costs, budgeting, and generating investor returns. He will also play a key role in securing new investments and managing operational risks.

Key Responsibilities

- Overseeing financial operations and investment management.
- Analyzing profit margins, financial projections, and operational costs.
- Handling strategic partnerships, acquisitions, and vendor negotiations.
- Managing long-term investor relations and ensuring profitability.

Media Pop Marketing Partner

Expertise

Media Pop is a full-service digital marketing agency specializing in integrated marketing strategies that combine creative solutions with data-driven performance. As Willamette House's exclusive marketing partner, Media Pop will handle all marketing and branding efforts, ensuring that the care homes' services and value propositions reach the target audience effectively.

Website: www.media-pop.com

About Media Pop

Media Pop is a highly experienced digital marketing agency with a proven track record of helping brands grow through innovative marketing strategies.

They specialize in increasing brand visibility, generating customer engagement, and optimizing online sales funnels. Their team will handle everything from website design and SEO to paid media campaigns and influencer partnerships, providing a comprehensive solution to Willamette House's marketing needs.

Key Responsibilities

- Designing and executing digital marketing campaigns (SEO, SEM, social media, and paid advertising).
- Developing a strong online presence and brand identity for Willamette House.
- Implementing lead generation strategies to attract new clients.
- Managing public relations and media outreach to build awareness in the community.

Emanuela Pop

Chief Marketing and Investment Officer (CMIO)

Expertise

Marketing Strategy, Business Development, Investment Relations

Willamette House, Emanuela Pop will lead all marketing, business development, and investment efforts.

Emanuela is a seasoned marketing professional with expertise in building high-impact campaigns that generate results. Her role will include overseeing the day-to-day marketing operations, managing investor relationships, and spearheading business development efforts to scale Willamette House.

Key Responsibilities

- Overseeing the creation and implementation of marketing strategies.
- Managing investor outreach, relations, and partnerships.
- Coordinating market research, branding, and public relations efforts.
- Driving the overall growth strategy, ensuring the company attracts clients and investors alike.

Medical Team Healthcare Leadership and Care Providers

Given the nature of the business, medical expertise will be integral to providing the highest level of care for residents.

The medical team will include doctors, nurses, and specialists who will provide care on-site and ensure residents' medical needs are met in a compassionate and professional manner.

Medical Director

Physician (Full-Time or Part-Time)

Expertise

Medical Oversight, Resident Health,
Emergency Response, Care Coordination

The Medical Director will be a licensed physician responsible for overseeing the overall health and medical care of residents.

They will set medical protocols, ensure that the care home complies with health regulations, and be available for consultations regarding resident health and emergencies.

Key Responsibilities

- Providing medical oversight and leadership to the healthcare team.
- Creating and implementing care protocols for medical treatment and health management.
- Working with other healthcare providers to ensure the best possible outcomes for residents.
- Conducting medical evaluations of new residents.

Registered Nurse (RN)

Full-Time

Expertise

Nursing Care, Patient Monitoring, Medication Management

The Registered Nurse will play a pivotal role in daily resident care, including administering medications, performing health assessments, and coordinating care for residents with complex medical needs.

The RN will work closely with the Medical Director to ensure the health and well-being of each resident.

Key Responsibilities

- Administering daily medications and treatments as prescribed.
- Monitoring the physical health and safety of all residents.
- Training staff on patient care best practices.
- Communicating with families regarding resident health concerns.

Caregivers and Personal Care Assistants (PCAs)

2-3 Full-Time Staff

Expertise

Daily Living Assistance, Resident Care

Caregivers will assist residents with activities of daily living (ADLs), including bathing, dressing, eating, and toileting.

They will be the primary support for residents and ensure that residents feel comfortable, secure, and cared for on a daily basis.

Key Responsibilities

- Assisting residents with personal care and hygiene.
- Offering companionship and emotional support.
- Monitoring residents' well-being and reporting any health concerns to the RN or Medical Director.
- Assisting with mobility and transfers.

Real Estate and Facility Management Team

As the business scales, a team will be required to manage property acquisition, development, and maintenance. This team will handle the operational aspects of maintaining the homes, ensuring that they are safe, comfortable, and compliant with regulations.

Property Manager

Expertise

Facility Maintenance, Property Operations

The Property Manager will be responsible for overseeing the day-to-day operations of the residential care homes.

This includes managing the property maintenance, repairs, and general upkeep to ensure a safe and welcoming environment for residents.

Key Responsibilities

- Ensuring all facilities are ADA-compliant and maintain high standards of cleanliness.
- Managing vendor relationships for routine maintenance and emergency repairs.
- Overseeing building inspections and regulatory compliance.

Facilities Maintenance Technician

Expertise

Building Maintenance, Equipment Repairs

A Maintenance Technician will be on-site to handle day-to-day repairs, emergency fixes, and general upkeep of the property to ensure that the home runs smoothly.

Key Responsibilities

- Maintaining the home's infrastructure (e.g., plumbing, electrical, heating/cooling systems).
- Managing minor repairs and addressing any immediate issues that arise.

Administrative Support and Operations Team

A small administrative team will handle day-to-day operational tasks such as accounting, scheduling, and record-keeping.

Administrative Assistant

Expertise: Scheduling, Client Relations, Data Management

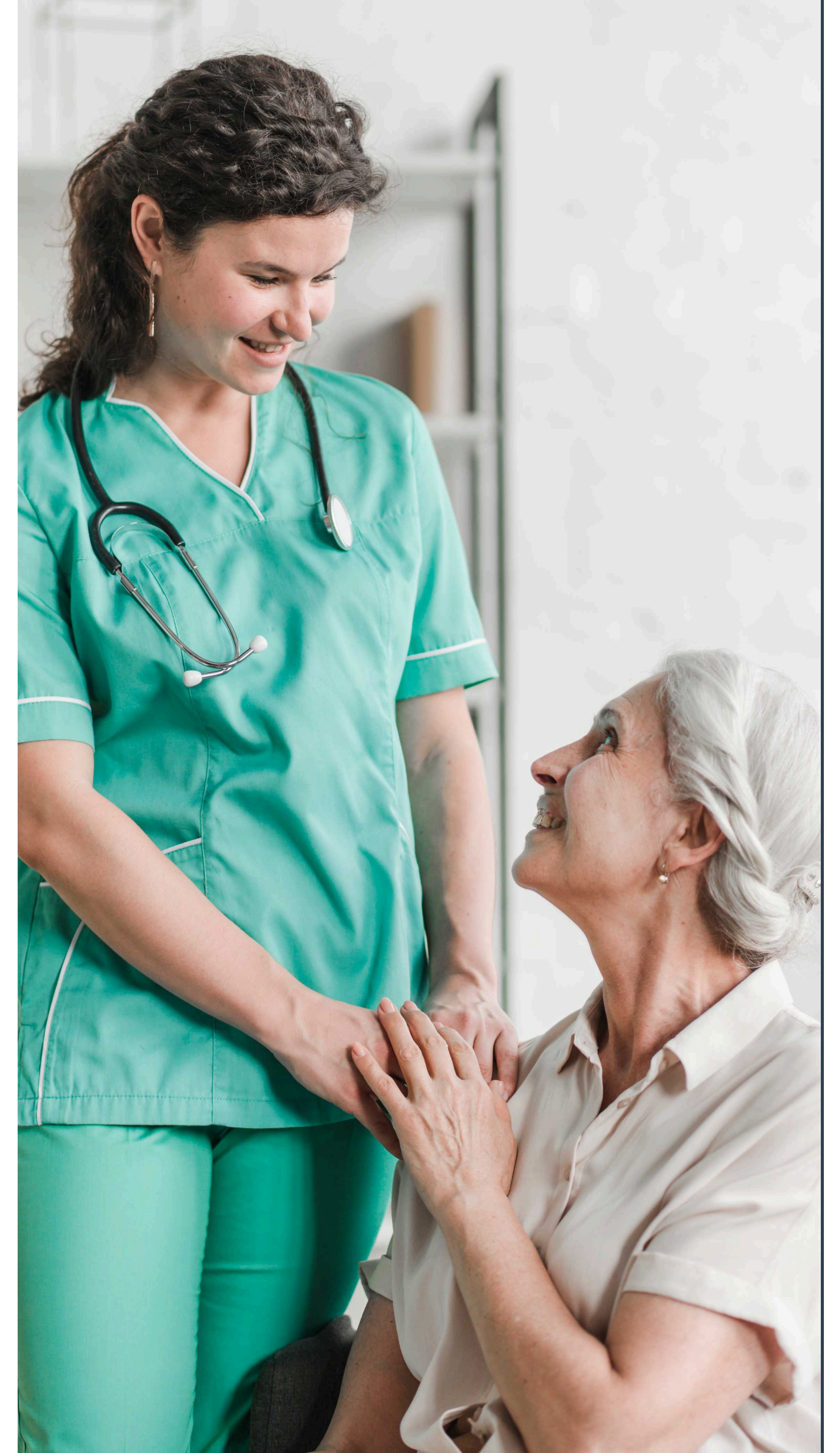
This person will manage scheduling, handle inquiries from prospective clients, and assist with various administrative tasks to keep the operations running smoothly.

Key Responsibilities:

- Managing client intake and scheduling assessments.
- Assisting with billing, insurance claims, and financial record-keeping.
- Answering resident and family inquiries.

Summary of Willamette House Leadership Team

- **George Odoi** – *CEO*: Overall leadership and strategy.
- **William Woods** – *Co-Founder/Partner*: Financial strategy, investor relations.
- **Media Pop** – *Marketing Partner*: Branding, digital marketing, advertising.
- **Emanuela Pop** – *Chief Marketing and Investment Officer*: Marketing strategy, business development, investor relations.
- **Medical Team** – Medical Director, Registered Nurse, Caregivers, and Personal Care Assistants.
- **Real Estate and Facilities Team** – Property Manager, Maintenance Technicians.
- **Administrative Team** – Administrative Assistant.



Insurance Needs for Assisted Living and Projected Costs for 7 Residents





In the residential assisted living industry, insurance plays a critical role in protecting the business, residents, staff, and the real estate assets.

For Willamette House, securing the proper insurance coverage is not only a regulatory requirement but also a key component of risk management and long-term sustainability.

This section outlines the essential types of insurance required for an assisted living home and provides an estimate of the projected insurance costs for 7 residents.

Essential Insurance Types for Assisted Living Homes

As an assisted living facility, Willamette House must carry multiple forms of insurance to ensure the safety and protection of the business, residents, and staff.

Here are the main types of insurance that we will need:

General Liability Insurance

- **Purpose:** General liability insurance covers incidents such as accidents or injuries that might occur on the property, such as a resident or visitor falling, a slip-and-fall incident, or damage to someone's property.
- **Coverage:** This will typically cover bodily injury, property damage, medical payments, and legal fees related to accidents.

Estimated Cost:

Annual premium: Typically ranges from **\$2,000 to \$5,000 per year**, depending on the size of the facility, location, and risk profile.

Professional Liability Insurance

(Errors & Omissions Insurance)

- **Purpose:** This type of insurance protects the business against claims related to negligence, professional mistakes, or omissions in the provision of care, including errors made by staff in assisting with daily activities or healthcare.
- **Coverage:** This would include protection against lawsuits alleging poor care, inadequate supervision, or failure to meet resident needs.

Estimated Cost:

Annual premium: Generally ranges from **\$1,500 to \$4,000 per year** based on the number of residents and staff, as well as the types of services provided.

Property Insurance

- **Purpose:** Property insurance covers the physical structure of the facility against risks like fire, theft, vandalism, storm damage, or other catastrophic events. This is essential to protect the real estate investment.
- **Coverage:** Includes coverage for the building, furniture, fixtures, and equipment.

Estimated Cost:

Annual premium: For a small to medium-sized care home, this might cost **\$2,000 to \$7,000 per year**, depending on the property value, location, and risk factors.

Workers' Compensation Insurance

- **Purpose:** Workers' compensation insurance covers medical costs and lost wages for employees who are injured or become ill while working. As an assisted living facility, we will employ caregivers, housekeepers, and administrative staff, all of whom must be protected.
- **Coverage:** Covers on-the-job injuries, illnesses, and accidents.

Estimated Cost:

Annual premium: Typically, workers' comp insurance for care homes can cost between **\$4,000 and \$10,000 per year**, depending on the number of employees and the type of work they perform.

Umbrella Insurance

- **Purpose:** This is additional liability coverage that goes beyond the limits of your general and professional liability policies. It provides extra protection in case of major lawsuits, covering legal fees and settlements above the limits of other policies.
- **Coverage:** This insurance extends to both general and professional liability and protects the business in case of larger-than-expected claims.

Estimated Cost:

Annual premium: Typically ranges from **\$1,000 to \$3,000 per year** for a basic umbrella policy.

Health and Medical Malpractice Insurance

- **Purpose:** For homes providing direct medical care or oversight, medical malpractice insurance can protect the business in case a resident claims negligence related to healthcare services, medication administration, or failure to provide proper treatment.
- **Coverage:** Covers medical errors, medication mistakes, and general healthcare-related risks.

Estimated Cost:

Annual premium: Generally costs between **\$2,000 and \$5,000 per year** depending on the scale of healthcare services provided.

Projected Insurance Costs for 7 Residents at Willamette House

To provide a rough estimate of the annual insurance costs for a facility with 7 residents, we can calculate a combined insurance expense based on the premiums for each type of insurance described above.

Here is a projection:

Insurance Type

Annual Premium Estimate

General Liability Insurance

\$2,500 - \$5,000

Professional Liability

\$1,500 - \$4,000

Property Insurance

\$2,000 - \$7,000

Workers' Compensation

\$4,000 - \$10,000

Umbrella Insurance

\$1,000 - \$3,000

Health and Medical Malpractice

\$2,000 - \$5,000

Total Estimated Insurance

\$13,000 - \$34,000/year



Cost Per Resident

Given the total estimated range for all insurance premiums (from \$13,000 to \$34,000 per year), here's how the cost of insurance might break down per resident:

- **Low Estimate:** If the total insurance cost is \$13,000/year for the entire facility, the cost per resident would be approximately \$1,857 per year (or about \$155 per month).
- **High Estimate:** If the total insurance cost is \$34,000/year, the cost per resident would be approximately \$4,857 per year (or about \$405 per month).

Insurance is an essential component of running an assisted living facility like Willamette House. It helps safeguard against financial losses from accidents, injuries, legal claims, and other unforeseen events.

For a small facility with 7 residents, annual insurance premiums are expected to range **from \$13,000 to \$34,000 in total, or between \$1,857 to \$4,857 per resident annually**, depending on the specific coverage and the insurance providers we select.

This coverage not only protects the business but also ensures the safety and well-being of residents, staff, and the property. We will continue to work with trusted insurance partners to maintain robust, cost-effective coverage as we grow and expand our services.



**WILLAMETTE
HOUSE**