



SALES AND MARKETING ROUNDTABLE #272:

A conversation with residents from three Greystone communities with Mary Jane Fitts

Thank you to everyone who attended our latest Sales and Marketing Roundtable! To provide anonymity during the Roundtable discussion, participants and their communities will not be identified.

ABOUT OUR GUESTS

At this week's Roundtable, we dug into the heart of community living with Mary Jane Fitts of Greystone Communities. Mary Jane shared incredible stories and insights shared directly by residents from three Greystone communities.

The conversation underscored the value of moving early, the role of finances and flexible contracts, and the growing expectation for technology and personalization for younger generations – among many other topics.



“We didn’t ask our kids what they thought about (us moving into a community). We told them, ‘This is what we’re doing.’” (John Marshall)



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FRESH PERSPECTIVES

- **CHOOSING EARLY IS EMPOWERING** – Residents stressed the value of moving before you're forced by circumstance. Making the decision proactively allows for more choice, better planning, and peace of mind, instead of scrambling after a crisis.
- **BALANCING COST WITH LONG-TERM VALUE** – While buy-ins can feel steep, residents pointed out tax benefits, financial strategies, and cost trade-offs that make CCRCs or Life Plan Communities more attainable. The real return is stability, access to care, and the freedom from unexpected expenses down the road.
- **COMMUNITY AS A LIFESTYLE UPGRADE** – Beyond care, CCRCs and Life Plan Communities offer enrichment: lifelong learning, social connection, and plenty of activities. Residents emphasized that communities aren't about "old people" but about staying active, engaged, and supported at every age.
- **RESPONSIVE, TRANSPARENT SALES MATTER** – Positive experiences came from communities with open communication, quick follow-ups, and honest options. In contrast, for-profit facilities with turnover, rising costs, and poor service left negative impressions. Transparency builds trust.
- **FUTURE RESIDENTS WILL BE YOUNGER AND TECH-SAVVY** – The next wave of residents will expect technology to be woven into daily life. Flexible contracts and innovative service models will also be essential to attract and reassure this younger demographic.

LINKS & CONTACT INFO

Mary Jane Fitts ([Linkedin](#))

Greystone Communities ([website](#))

COMING UP ON VARSITY'S ROUNDTABLE!

Please join our next Roundtable gathering on Thursday, September 4 at noon ET, 11 a.m. CT and 9 a.m. PT. We'll be joined by Shane McDougall from Spring Harbor at Green Island. Shane will be discussing the value of community partnerships.

NEW ON VARSITY'S PODCAST, ROUNDTABLE TALK

On our newest episode of Varsity's Roundtable Talk, we sit down with Bridget Weston, CEO of SCORE, a nonprofit dedicated to mentoring and educating small business owners. Bridget has spent more than 16 years helping lead SCORE's mission, which has long relied on the expertise of retired and older mentors who bring decades of business experience to the entrepreneurs they serve.

Derek and Bridget discuss how SCORE pairs seasoned professionals with younger entrepreneurs, how older mentors stay engaged and purposeful through volunteering and the role of encore entrepreneurs (age 55+) in starting new ventures.

Check out the [episode here](#) on the Varsity website!





Welcome to our Roundtable guests!

DR. MEG BURKE - Dr. Meg Burke is a resident at Aberdeen Ridge in Colorado Springs, which opened in October. She is a retired marine biologist who previously worked at a major natural history museum in San Francisco. Since 2006, she has been involved in research, conservation, and education efforts focused on coral reefs in the Philippines, and she is preparing to return there soon to continue this work.

BILL McGAUGHEY - Bill McGaughey is a resident of The Farms at Bailey Station in Collierville, Tennessee, near Memphis. A native of Memphis, he spent over 50 years in the banking industry and was involved in the early planning of the community where he now lives. Though he never expected to become a resident himself, he describes the experience as a blessing. In retirement, he enjoys playing golf.

JOHN MARSHALL - John Marshall is a depositor at Bella Vida in San Antonio. A retired Army veteran, he retired from Boeing six months ago and joined the Medicare ranks 3 months ago. Since retirement, he and his wife have dedicated their time to traveling extensively. Currently spending time in the Cascade Mountains of Oregon after stops in Alaska, Europe, Iceland, Chicago area, Interstate 10 to the Pacific Coast Highway (PCH), and the PCH to the Portland area, John shared that a recent home repair issue reinforced his decision to transition into a senior living community like Bella Vida.



QUESTION FOR BILL:

As a board member, how did that familiarity influence you and help you become a resident?

Bill shared that his connection to senior living communities goes way back—he even did the financing for Kirby Pines, a sister community in Memphis, back in the late 1960s. Later, he financed the land for The Farms at Bailey Station in 2003, never imagining he'd one day call it home. By 2017, he and his wife had moved in, and now they couldn't be happier with the community of 63 homes and 173 apartments.

He laughed about how his wife once said she didn't want to live "with all those old people," and he reminded her, "That's us!" Their decision to move has already proven to be the right one—when his wife had two falls last year, she was cared for in their on-site skilled care community. Bill was able to walk across the street to see her every day, and then head home when she was ready for a break. He says that kind of support and convenience has made all the difference.



QUESTION FOR JOHN: How did you discover your community? How did it come into your life?

John explained that his decision to choose a Life Plan Community really came from watching the experiences of his own parents. One set of parents moved into a community, and it's been a huge relief for the family. The other set didn't, and it's placed a heavy burden—his wife Gracia even had to retire early to care for her mother for more than a decade. Seeing those two very different paths made it clear: they don't want to be a burden on their kids.

Even though they sometimes wonder if they're moving "too young," John said they also recognize the bigger picture. With the wave of aging boomers and a limited supply of units, waiting could make things harder later. He and Gracia prayed about it, thought it through, and ultimately felt this was the right time to secure their spot. While they may still be a couple of years away from moving in, having their foot in the door gives them peace of mind that they're making the right choice.



QUESTION FOR MEG:

As a retired marine biologist and educator, how important was it to find a community that offered intellectual stimulation?

For Meg, finding a community with plenty of intellectual stimulation was a top priority. She saw how beneficial a Life Plan Community was for her own parents in South Florida, and decided early on that when the time came, she'd seek out something similar for herself. At Aberdeen Ridge, she's found exactly what she hoped for—fascinating neighbors with rich life stories, plus a wide range of activities she can choose to join without any pressure.

She also loves that she still has the freedom to travel and stay active off campus—she drives, she explores, and she's still heading off on research trips. Meg laughed that the only real downside is having to line up someone to water her plants (and eventually care for the dog she plans to get). For her, the balance of stimulation, community, and independence has been just right.



QUESTION FOR BILL:

**When talking with your family,
how did you handle the decision
to move into a community?**

Bill admitted his wife was reluctant at first—they were comfortable in their Germantown townhouse, and she worried about being surrounded by “old people.” But for Bill, the move made sense. He’d spent his career in banking, not fixing cars or appliances, and he wanted a maintenance-free lifestyle.

Now, they enjoy a community with a wide mix of ages and plenty of activities—from dances to guest programs to even a senior Olympics. Bill likes that you can stay as busy as you want, but nothing is forced, making the move the right fit for both of them.



QUESTION FOR JOHN:

How did cost and affordability influence your decision to move into a community?

John said affordability was a significant factor for him and Gracia—not so much the monthly fees, but the steep buy-in. They worked with their financial advisor before John retired, and he reassured them it was doable, which gave them confidence to move forward.

Finances are still their main discussion point, but John noted that waiting could mean higher costs and fewer options down the road. For them, locking in now felt like the smarter long-term choice.



QUESTION FOR MEG:

What factors influenced your decision to move to a community in Colorado?

Meg said the pandemic sped up her decision—she had planned to keep working into her mid-70s, but when her museum shut down, she began researching continuing care communities. For her, two things were non-negotiable: it had to be a true continuing care model and nonprofit.

She considered California, where she had lived, but ruled it out due to wildfires. South Florida, where her parents had been, was also off the list because of hurricanes and flooding. That left Minnesota, where her sister lives, and Colorado Springs, where her sister-in-law lives and where Meg had been visiting for decades. In the end, the Rocky Mountain views and Southwestern culture won her over—making Aberdeen Ridge the clear choice.



QUESTION FOR THE GROUP:

What advice would you give to those on this call when it comes to marketing to potential residents?

BILL - Bill suggested that when marketing to potential residents, it's important to highlight the financial side—especially the tax benefits of living in a CCRC or Life Plan Community. He noted that while the upfront cost can look intimidating, there are deductions and strategies, like applying healthcare tax breaks or using required minimum distributions, that can make it more manageable.

JOHN - While the buy-in is still the biggest hurdle, John said being on the ground floor of development (being able to choose interiors and other designs) make it worthwhile. For them, Bella Vida's promise of in-home assisted living was especially compelling—it means they can stay together and receive care without needing to move across campus, which he sees as a major selling point.

MEG - Meg emphasized that future residents will be younger and more tech-savvy, so highlighting technology is key in marketing. She also pointed out that the steep entry fee can be a major hurdle, but flexible contract options make a big difference.

QUESTIONS

WHEN SHOPPING AROUND FOR A COMMUNITY, DID ANY OF YOU HAVE ANY NEGATIVE EXPERIENCES WITH MARKETING AND SALES TEAMS?

BILL - Bill said he didn't have any real negative run-ins with sales teams, but his past experience gave him perspective. For him, the key lesson is that you don't want to wait until you're forced into a decision—making the choice yourself, when you still can, makes all the difference.

MEG - Meg said Aberdeen Ridge is the only community she's lived in, but during her research she heard concerns about local for-profit options. Residents who moved over from those places often complained about frequent ownership changes, rising prices, and even poor food quality.

JOHN - John said one of the things that really stood out about Bella Vida was how responsive the team has been throughout the process. Every time he and Gracia ask a question, they get a quick, clear answer—no delays, no chasing people down. He contrasted that with other communities, where they often had to follow up repeatedly just to set appointments. At Bella Vida, he said, the communication has been excellent—if anything, almost too much, but in a good way.

WHO MAKES THE DETERMINATION FOR WHEN A RESIDENT NEEDS MORE CARE?

Mary Jane explained that in the communities she supports, a care navigator (titles vary) works with the resident and family to decide when more care is needed. It's a collaborative process, not a quick call.