

David and Joan Rice Interview, May 2017

J: June

D: David

R: Joan

5:21

J: Hello.

D: Hi.

J: Hi, is this Dave?

D: Yeah, this is David Rice.

J: Hi David, this is June Hussey in Tucson. Thanks for calling in. Is your wife there too?

D: Yeah, she's here.

B: You've got Julie, the move-in coordinator. I was just eavesdropping for my first interview call.

J: Oh nice. Hi Julie, nice to see you. Can everybody hear me ok?

R: Yes, I think we can. I can hear you.

J: Good, perfect. So now that we have established we can hear each other, I want to just thank you for sharing a bit of your time with us this morning. And I'll begin by explaining why we do these interviews and we do quite a few of them. And it's really a privilege for me to get to know so many residents not only there at The Fountains at Lake Pointe Woods but all over the country where Watermark has communities. And what we are interested in finding out from you today is, in addition to learning a little bit about your lives, we will get into some questions about how you first thought about what you wanted to do in your future, in terms of where to live and live your best life, how you went about deciding where that was going to be and then how the move went and how your lives are both the same and different now that you have moved. So, I will be asking some specific questions around those but in the beginning, I'm going to ask you to just introduce yourself and tell us a little bit about your lives. But before I invite you to do that I also want to make sure you know we are recording this so that we can have an accurate transcript of the discussion. Should you happen to blurt out anything that you don't want to make public you can just say so right then and there, "Oops, please don't publish that part." And we'll make sure we don't, ok?

D: Ok.

J: Alright, perfect.

D: We are not on a speakerphone so my wife is on one phone and I'm on another. Is it ok if we interrupt each other?

J: Absolutely. You can go back and forth, and finish each other's sentences if you want. We will be able to tell the difference between your voices.

D: Ok.

J: So, with that out of the way let's spend the next couple of minutes here with each of you introducing yourselves and sharing whatever you would like to share about your lives, where you're from, your families, your careers, your hobbies, whatever you would like to share to help us get to know each of you. So, go right ahead, either one of you

can start.

D: Ok, I'll start first. If I'm getting wordy or saying more than you want just shut me off.

J: Ok.

D: We are from the Boston area of Massachusetts and we spent most of our life there. I went to college there. My wife went to college there. And after four years in the Navy we moved back there and spent my working career there. We have two sons. One son lives in Bradenton, Florida and he has two children. My other son lives in State College, Pennsylvania with his wife and they're retired. That is a real quick synopsis. I could get into more detail but I don't know how much detail you want.

J: Anything else you want to share or Joan you can jump in and talk about yourself?

R: Basically, David has sort of given you our background. We have been married for 60 years so that tells you how old we are. We've had a good life, it's been an interesting life and this is another interesting part of our life. We have been here four months and so far we are very happy and content.

J: And how long ago did you leave Boston for Florida?

R: We've been in Florida now 23 years.

J: And where did you originally move to in Florida?

R: We lived in Bradenton in a country club and a golf community. And we were there for many, many years. Then it got to the point, you know, where we thought it's about time we thought about doing something permanently, not that that wasn't permanent. This is why we ended up here.

J: Were you golfers when you lived in the golf community?

R: Yes and that's the only thing that I miss is the golf because I still was playing when I left there. Other than that, we basically live almost the same way as when we were living there. We have all new friends, which are all wonderful people. It's a lovely lovely community here which, I don't care who you speak to, they all say the same thing. I mean, I don't think I've heard a bad thing said about The Fountains. We looked at about 4 or 5 other places, there was no way, especially the high-rises. I did not want to live in a high-rise so this is where we ended up and so far, so good. We think we made the right move. Our youngest son who has the children could not understand it and he happens to be married to an Italian first-generation gal and she was almost angry with us when we told her we were going to do this. She said, "I don't understand it," she said, "we are living here and you are going to go into a home. I expected you to come live with us." And I said, "Oh, no way are we going to come live with you, we wouldn't do that to you. We just don't want you guys worrying about us and so on and so forth." But to this day neither one of them seem to understand it. Hopefully they will eventually. They know we are happy and they're glad we are happy but they just don't seem to get it.

J: Take me back to before you decided it was time to move and you looked at all the places, what was going on in your minds at that point that made you think that this was the right time to start looking?

D: Let me answer that. Let me start to answer that anyway. This move was driven by my wife. She was the one who felt that it was time to move and I was kind of a reluctant follower. And her reason for wanting to move was that down the road she did not want to have the responsibility of living in a single-family home and having to sell it and having to find someplace to live and making new friends and so forth. So, she was the

one who drove us originally to make the move. Go ahead Joan you can pop in now.

R: That's basically it. It wasn't just me. I said to David, "If something happened to me then you are sitting here with this house all alone." It was a lovely neighborhood and we had nice friends and everything but I don't know, it just seemed like the thing to do.

J: And that's a very common thing, when I talk to couples, that it usually starts with one and the other is a little reluctant at first. Joan, did you have an experience with friends or relatives that you witnessed kind of go through a difficult time, having not planned ahead like you did or did you just sort of think of it on your own?

R: I just sort of thought of this on my own, that this is what we should do.

J: And so how did you convince your husband to come along and convince him that you were right?

R: Well, I don't know he just finally said, "Ok, we'll do it." But unfortunately, when we moved here for the first couple of months he was extremely unhappy and he said to me, "I don't want to stay here." I'm saying, "What are we going to do?" I mean what else can we do and fortunately he came around. I don't know why it happened but he just did and then he's been fine ever since, thank goodness.

J: Talk about that Dave, what made you feel so unsettled and why do you feel better about it now?

D: It's hard to explain. It's a big move in anybody's life to go from living in a country club golf course scenario and moving into an independent retirement community. It's probably and I'm not the only one who has said this, it's probably one of the biggest moves that many people make.

R: I believe that.

D: And it was the adjustment that I had to make and it's just a different style of living. Not that it's bad but it's just a different style of living and a different. And it took me about two months to adjust but after I adjusted, it's like I woke up one morning and I felt like this is where I belonged. After I adjusted I'm fine because we've met a lot of people. We've kind of got a routine going and things to do and places to go and everything just kind of fell into place.

J: What are some of the things that you enjoy about the new routine you have?

D: Well, we like to exercise and we belonged to the Y when we lived in the golf community. There is a very good in-house exercise program at The Fountains and we enjoy that very much and we go to it twice a week. And right down from our apartment is the library and we both like to read and we utilize the library quite often. As far as dining is concerned we have the classic plan which means that we don't go to every meal every day in the dining room. We go when we want to go and sometimes we eat in our apartment and sometimes we go out in the community and have dinner. We like that flexibility of being able to choose different scenarios for our evening meal. We go out with friends that we've met here and we eat in here with friends we've met here. Of course, they are redoing our swimming pool but once they get that done we will be utilizing that in the summertime. Of course, various things that go on here that we participate in. A couple times a month they have a music performance down in the lobby and we enjoy going to that. Last week we went on a tour of the kitchen with the chef which was very interesting. The week before that the chefs took a bunch of us down to the beach and had a cookout down on the beach. So those are the things that we have enjoyed. Of course, we still socialize with our friends where we used to live and still do

things with them. So, we have friends here and we have our old friends that we still socialize with.

R: We are as busy as we want to be. Sometimes we're too busy, as a matter of fact.

D: We are definitely busier here than when we lived in the golf community.

J: I'm sure there are things about your previous home that you miss, the golf for example, but what are the things you don't miss about having your own house?

D: I don't miss the responsibility of having to handle all the repairs or have the repairs done by a contractor such as repairing the roof, repairing the pool, doing the landscaping, all those things we don't have to worry about anymore. I'll tell you that's a big load off my mind because we were going to have to put a new roof on in a year or two, our pool was going to have to be resurfaced in a year or two. Our landscaping was going to have to be replaced because it was getting old. I don't have to worry about that anymore. That's a big plus.

R: We had a lot of landscaping and I enjoy doing that to the point I miss it here. It was getting to the point that it was getting too much for me because it was a lot to take care of and I just couldn't do it anymore. I'm 81 years old. I'm in pretty good shape but you know it was just getting to be too much. We have two lanais here and I have all my plants, I'm constantly buying plants and putting plants out in the lanai so that's my garden now. It's much easier to maintain.

J: Good, tell me about your apartment. How did you go about selecting it and what are the features, just sort of describe it for us?

R: It's a lovely apartment. It's big; 1700 square feet. It's two apartments put together. We have one huge huge room which the majority of people make part of a dining room but I did not want dining room. I wasn't going to be entertaining and so on and so forth so we have like one whole wall with the bookcases and David's big desk that comes out from the bookcases with all his paraphernalia.

D: Computers.

R: Computers and everything. The other side of the room is sort of divided by a sectional sofa, it sort of breaks it up and a TV and so on and so forth. We have two bedrooms and two full baths. We have a quite large galley kitchen with many many cupboards. Many more than I need because I got rid of a lot of stuff but it's a lovely apartment and it's the second floor and it overlooks, we're almost at the top of the trees so it's almost like we're looking into and down the trees and it's very very pretty from both lanais. So, we like it a lot and as I say it's very spacious. We have all the room, practically all our furniture fit in here except we didn't bring the dining room table. I just have a small little round table that when we do eat here David and I sit at. It's just nice. It's the perfect size for us. We wouldn't want anything bigger or anything smaller.

D: We have a laundry room.

R: They all have laundry rooms. So that's about the size of it.

J: That's great. Now, you mentioned you stay in touch with your friends from your old neighborhood, have they come over to visit you and do you entertain ever in the dining room?

R: We have them come over and sometimes they come over for dinner and we eat here. They're all impressed because the food is excellent here. There's no two ways about it. I mean everybody says the same thing. The food is so good. He's a wonderful chef, I mean, we are very impressed by him. And we just or we will have lunch with

them here or will go out to lunch someplace.

D: We have had all our friends in to see our apartment, in to see The Fountains and either for dinner or for lunch. Now we are expanding a little bit. We have some friends that used to live in our old neighborhood who had moved up to Sun City which is north of here and they emailed me yesterday and said they wanted to come down to see The Fountains because they're thinking of possibly making a move. And so, we've had a lot of our friends come down for either dinner or for lunch and to show them The Fountains.

J: That's nice.

R: One thing that did concern me when we first came here was the fact of living in an apartment because we have never lived in an apartment, I mean ever. I thought this is going to be rather different and being on the second floor you've got the elevator. I've never been in an elevator so many times in four months than in my entire life. But I don't like taking the stairs particularly because they're all metal stairs which course they have to be but I'm just leery of falling down the stairs. Not too many people take the stairs so you could lay there for a while.

J: Ok and so you moved in not so long ago, four months ago and how long would you say that you were looking around before you made your decision where you were going to move? Was it like a year or months or weeks?

D: We started looking around in August of last year. We looked about two months in August and September and October. We looked around and we made the decision that The Fountains was the place we wanted to be. Then we had the problem of coordinating the selling of our house because we needed to sell our house to raise the funds to buy into The Fountains so we went through a period of trying to figure out when we were going to put our house on the market and what was the best time to put it on the market to sell it. It was within 60 days. And so that's what we went through in October November, then we put our house on the market and we sold it in 24 hours.

J: Oh my gosh.

D: Then we called up our sales representative, Beth, we said, "We sold our house we need a place." We thought we wanted to be on the first floor and she said I don't have anything on the first floor but I have a second-floor apartment. And I said, "We'll be down to look at it." And we came down and we liked it. We bought it. Everything happened very quickly. It all came together all at once.

J: Wow, that sounds like it was meant to be. Now, did you build in the shelves and the desk and buy new stuff or did you bring stuff from your old house?

D: We brought stuff from our old house but the desk unit we bought at a furniture store because in our house in our golf community I had a built-in shelf and bookcase in the den and obviously I couldn't bring the built-it so we had to go out and buy a whole new set of desk and bookcases.

R: But it's very very attractive and really looks nice.

D: That's about the only piece of furniture that we had to buy was the desk unit.

R: Everything else as I say fit in, fit in beautifully and of course the coordinator that worked with us is marvelous. She had everything, she said it'll all fit and I kept saying, "Are you sure it's all going to fit?" And son of a gun it did.

J: Well, what kind of advice would you have for other couples out there that either may be like Dave, you know, think they don't want to ever move or people like Joan, who think they need to convince their husband to move. There's all kinds of people out there

and there's all kinds of reasons to move and not to move. What would you tell couples that may be in the same shoes you were in?

R: Well, you want to start that David?

D: Do you have anything?

R: I don't know I just feel that, you know, the older you get the harder it is for the move. Now, even with, that's one thing I would tell somebody, even with all the help and all the packing that they did for us and everything, it still was a hard move. It was still a lot of work. And the older you get, the harder it's going to be to do it. I tell this all the time because it made such an impression on me. We came here for lunch like a newcomer's or I don't know what it was, the lunch that we came to but on our way out, we were walking through the lobby and there was a lady out there and she was doing something, I don't know what it was she was doing and I just looked at her and smiled and said, "Hi" and she looked at me and all she said was, "Don't wait." And I thought, I really thought about that a lot, don't wait, that's a very good piece of advice.

D: A perfect example, we have some friends living in our old neighborhood, our old community and they were very good friends and the wife wanted to move and her husband didn't want to move, I say move that's move into a community like The Fountains, her husband did not want to. Tragically about a month ago he had an aortic aneurysm and passed away. And so now she has the house to sell because it's a big house and she doesn't want to live in that big house, she has a house to sell, she has to look for place to move to and she has to move, pack up and go through all the ramifications of the finances and so forth involved in that. And if her husband had moved when she wanted to move, she would have been in a place like The Fountains and been all settled and not had to worry about all that. What Joan said is it's never too soon, you never know what's going to happen tomorrow.

R: As far as I'm concerned, that was very selfish on the husband's part, to be honest with you. They were both 87 but physically in very good condition although he did have this aneurysm on his aorta which I guess he wasn't in as good a physical condition as I thought. So, there she is and I mean I feel so badly for her because it didn't have to be.

D: I think that you've got to move into a retirement home when you are both healthy and can enjoy the retirement home and what it offers. And not come in when you're forced to come in because you're sick or one of the mates, either the husband or wife is sick. I think you've got to come in when you are both healthy and can enjoy yourselves.

R: We have two couples here that just, it just blows me away, one couple, she is 70 and he is 72. The other couple, he is 65 and she is 63. I was shocked, I mean that people so young would do that, but they love it and they are very happy so it doesn't make any difference how old you are or how young you are, I guess.

J: Well, every time I talk to people like yourselves from The Fountains at Lake Pointe Woods, I'm ready to move in and I'm only 55.

R: Well, see?

J: It sure sounds like a great way to live to me.

R: It takes an awful lot of worrying and responsibilities off of you.

D: It's a wonderful location because it's so convenient. There's a lot of malls near us and by near us I mean within five or ten minutes driving. And there's a lot of doctors and physicians in the area. And there's lots of restaurants. I mean, it's really convenient. There's everything around us.

R: I mean, we could be in downtown Sarasota in 15 minutes and of course you've got all the culture right there. It is, it's an ideal location.

J: And you had looked at, you mentioned, about five different communities. No two are alike. Were you surprised by anything that you learned about retirement communities in looking at the wide variety that's available?

D: Well, one thing. Two of them we looked at we were really turned off because they were high-rise apartment buildings that were at least 10 stories high. That completely turned us off because it was like living in a hotel. And the nice thing about The Fountains is it's three levels and it's like being in a resort, really.

R: And it's small, it's not humongous like some of those places.

D: There's 170 independent living units if I recall but it's small compared other ones we looked at. There was another, when we looked at, it was in Bradenton and it was an area that we didn't particularly like. In other words, it was out-of-the-way, it was kind of tacky and wasn't in a nice area like we are here.

R: The place itself was lovely though.

D: The place itself was nice but the general area it was in, it was not attractive. It wasn't convenient to shopping centers and things like that so that turned us right off. And then there's a couple places we didn't look at because we knew it was out of our price range and we just knew that we couldn't afford it so we didn't even look at them.

J: And how did you come up with this list of places to go? Is that something you researched on the computer or did you talk to people?

D: A combination of reading ads in the paper, talking to people in the community, doing a little bit of research on the Internet. But we pretty much knew of all the places, of all the independent retirement homes in the area that were available and we knew the ones that were high-priced by word-of-mouth and we knew the ones that we could afford. We did our homework. We had another couple who are younger, they are in their 70s, who are looking for the future. They are not interested now but they went with us to one or two places and they did their homework and they knew of places. So, it was kind of word-of-mouth. You learned by asking people what's the best place, what's expensive, what's not expensive that type of thing.

J: Would you say it was a chore to look at all these places or did you have fun doing it?

R: We enjoyed it.

D: We enjoyed it.

R: We really enjoyed doing it. It was very interesting and of course they also give you lunch, not that you went there for the lunch.

D: It was a learning experience.

R: I'm sure everyone must do it. I wouldn't think the first place you saw you would say, "This is it". I would feel like maybe this wasn't it if I hadn't already looked.

J: And to people who maybe have a closed mind to the whole idea and never have set foot in a retirement community and think they never ever want to move, what could you tell them that might change their mind?

D: I think they first should take advantage of the lunches that most of these facilities offer or, you know, open houses. Some of them have open houses, some of them have lunches. That they should take advantage of those and go and learn what's available. And look at four or five different facilities and see the differences in them and see what they have to offer. And they may come away, after looking at five and say, "Hey that's

not for me." But at least do your homework and find out what they are.

R: It might change their minds.

D: It might change their minds, talk to the people.

J: And so, let me ask you this, and we're big proponents of encouraging people to choose the community that's right for them: how did you know which community was right for you?

R: I think that's something, it's like when you go to buy a house, you walk in a house and you say, "This is it." Or you walk into a community, it just feels right. It's the only way I can think.

D: When you drive into The Fountains, it's beautiful. You are looking at the building, you're looking at the ponds and the fountains, the landscaping and the trees and you see the swimming pool. It's just a pretty entrance and then it's on 55 acres. There's a lot of trees and a lot of landscaping and it's very pretty. It's beautiful.

R: It really is its beautiful. It really is beautiful. It does look like a resort and many, many people have said that, "This doesn't look like a retirement place, it looks like a resort." It really is lovely.

D: And you walk into the lobby and right off the lobby is the main dining room which is lovely and I don't know, it just, as Joan said, you just had a good feeling about it.

R: Of course, one thing about this building versus a lot of the other ones, it was built, I'm sure maybe you know, it was built 35 years ago so the architecture is absolutely gorgeous and the woodwork that's in this place is amazing and the windows are all arched. It has a very warm feeling to it whereas some of the other places that are new are modernistic and they're cold but this is just a very warm, beautiful, beautiful building. Beautiful windows, every one of them is arched. They are just gorgeous.

J: Final question, what about the people you've met, what would you say about the kind of people that live there, your neighbors, the friends you've met, was that a pleasant surprise or did you know you are going to get along with people?

R: We're pretty good at getting along with people but the people are so friendly. I mean, when we first moved in, we were getting calls and notes under our door to join them for dinner. I mean, I can't tell you how many people asked us to have dinner with them. And we didn't even know them. The people are lovely, they truly are. I can honestly say they are so friendly and nice.

D: We've been here four months, we have at least 10 couples that we go out regularly for dinner now, not all once but one or two couples will go out for dinner here or go outside for dinner. In four months we've got 10 couples that we now consider friends that we dine with on a regular basis. I think that's pretty good, to walk into a place you don't know anybody and in four months end up with 10 couples that you are going out to dinner with on a regular basis.

R: You know, the people, it doesn't make any difference, now some of these people have got lots and lots of money. One couple we were with last night, I mean, he was a doctor but they don't flaunt it or they don't talk about, "You know I had this and I had a yacht and I had blah, blah, blah." It shows you what kind of people there are here.

D: The people are lovely, they really are.

R: Just as nice as nice can be and so willing to help do anything for you. It's just incredible. It really is.

J: Well, once again you've convinced me that's the place I want to live.

R: Yes, come join us. We'd love to have you.

J: Thanks, well, Dave and Joan, it's been a pleasure speaking with you both. I've taken up a lot of your day I know already and I want to let you go and enjoy the rest of your day so any final words of wisdom to share with anybody?

R: I don't know.

D: Don't knock it if you haven't tried it.

J: That's a good one, very good. Ok, well, thanks again. It's been a pleasure getting to know you both and I'm certainly glad that you've found the lifestyle there in a community that you love so much.

R: Thank you.

D: Thank you, nice talking to you.

J: Alright, take care now, bye now.

R: Bye bye.