



# City of Madison

## Proposed Rezoning and Preliminary Plat

Project Name  
Highlands Community

Location  
9601 Elderberry Road

Applicant  
Leo and Carol Ziegler/  
Bob Zoelle - United Financial Group

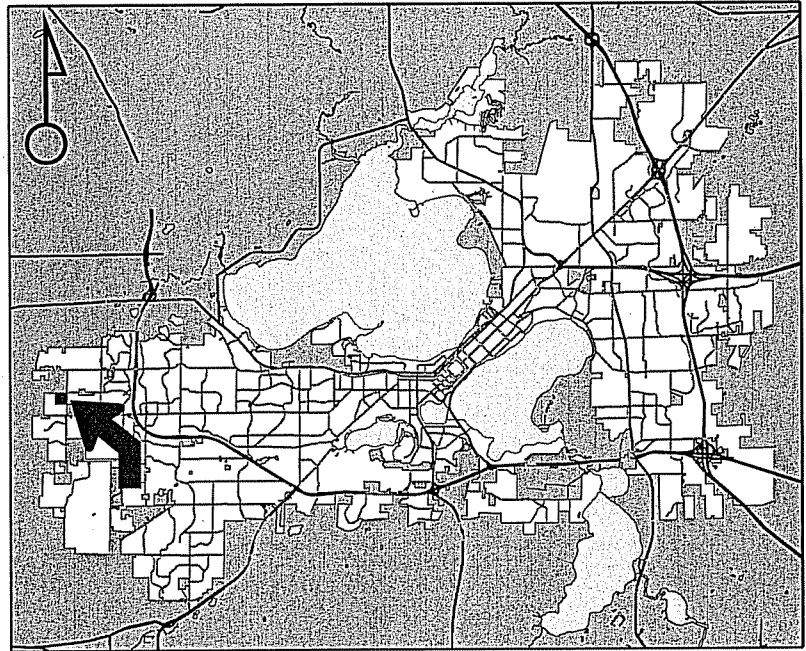
From: A To: TR-U1

Proposed Use  
Create 6 lots for future residential development with up to 390 dwelling units, 1 lot for future development, and 2 outlots for stormwater management

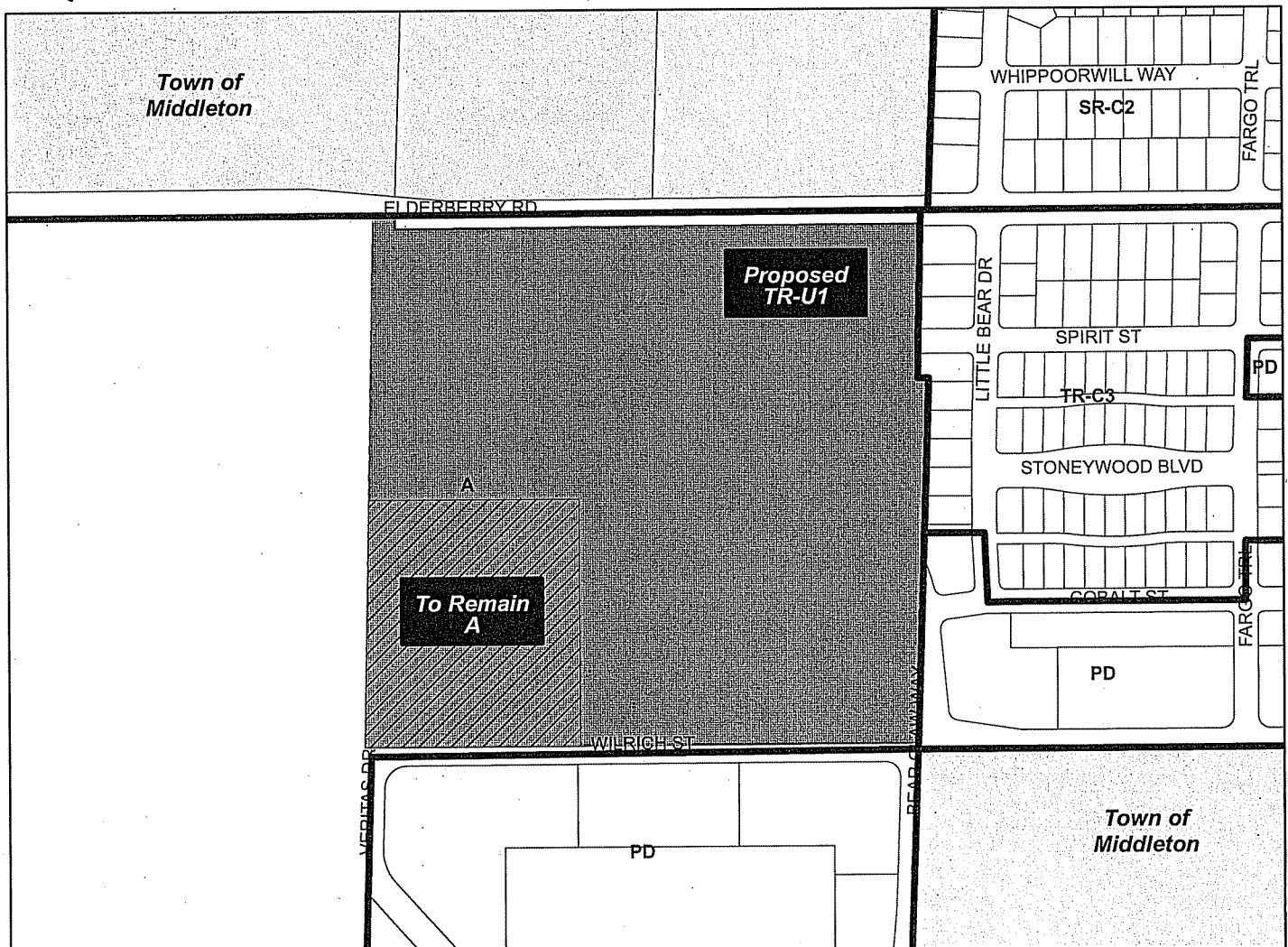
Public Hearing Date

Plan Commission  
06 May 2013

Common Council  
21 May 2013



For Questions Contact: Tim Parks at: 261-9632 or [tparks@cityofmadison.com](mailto:tparks@cityofmadison.com) or City Planning at 266-4635



Scale : 1" = 400'

City of Madison, Planning Division : RPJ : Date : 24 April 2013

13-14





# LAND USE APPLICATION Madison Plan Commission

215 Martin Luther King Jr. Blvd; Room LL-100  
PO Box 2985; Madison, Wisconsin 53701-2985  
Phone: 608.266.4635 | Facsimile: 608.267.8739

- The following information is required for all applications for Plan Commission review except subdivisions or land divisions, which should be filed using the Subdivision Application.
- A separate Urban Design Commission application is no longer required for projects requiring both Urban Design Commission and Plan Commission approvals.
- This form may also be completed online at <http://www.cityofmadison.com/developmentcenter/landdevelopment>
- All Land Use Applications should be filed with the Zoning Administrator at the above address.

FOR OFFICE USE ONLY:	
Amt. Paid <u>\$12850</u>	Receipt No. <u>140631</u>
Date Received <u>3/6/2013</u>	
Received By <u>MDP</u>	
Parcel No. <u>07081-213-0097-1</u>	
Aldermanic District <u>9 - Skidmore</u>	
GQ <u>ENG</u>	
Zoning District <u>A</u>	
For Complete Submittal	
Application <input checked="" type="checkbox"/>	Letter of Intent <input checked="" type="checkbox"/>
Photos <input checked="" type="checkbox"/>	Legal Descript. <input checked="" type="checkbox"/>
Plan Sets <input checked="" type="checkbox"/>	Zoning Text <input checked="" type="checkbox"/>
Alder Notification <u>1/11/13</u>	Waiver <input type="checkbox"/>
Ngbrhd. Assn Not. <u>1/11/13</u>	Waiver <input type="checkbox"/>
Date Sign Issued <u>3/6/13</u>	

1. Project Address: 9601 Elderberry Road, Madison, WI 53562 Project Area in Acres: 33.2584

Project Title (if any): Highlands Community

## 2. This is an application for (Check all that apply to your Land Use Application):

- ☒ Zoning Map Amendment from Agricultural to Traditional Residential-Urban District 1 (TR-U1)
- ☐ Major Amendment to Approved PD-GDP Zoning ☐ Major Amendment to Approved PD-SIP Zoning
- ☐ Conditional Use, or Major Alteration to an Approved Conditional Use
- ☐ Demolition Permit
- ☐ Review of Minor Alteration to Planned Development by the Plan Commission Only

## 3. Applicant, Agent & Property Owner Information:

Applicant's Name: Bob Zoelle, Vice President-Construction Company: United Financial Group, Inc.  
Street Address: 660 W. Ridgeview Drive City/State: Appleton, WI Zip: 54911  
Telephone: (877) 968-8100, Ext. 104 Fax: (920) 731-1696 Email: BZoelle@Ufgroup.net; JHusar@Ufgroup.net

Project Contact Person: Bob Zoelle, Vice President-Construction Company: United Financial Group, Inc.  
Street Address: 660 W. Ridgeview Drive City/State: Appleton, WI Zip: 54911  
Telephone: (877) 968-8100, Ext. 104 Fax: (920) 731-1696 Email: BZoelle@Ufgroup.net; Jhusar@Ufgroup.net

Property Owner (if not applicant): Leo A. and Carol K. Ziegler  
Street Address: 5031 Church Road City/State: Middleton, WI Zip: 53562

## 4. Project Information:

Provide a brief description of the project and all proposed uses of the site: Mixed-use residential community of

390 residences and 5 different housing components; southwest corner to remain as agricultural use for potential future commercial-employment with contemplated residential buffer.

Development Schedule: Commencement Phase One-2014 Completion Phase One-2015

## 5. Required Submittals:

- ☒ **Site Plans**, fully dimensioned and describing pertinent project details, submitted as follows below and depicting all lot lines; existing, altered, demolished and/or proposed buildings; parking areas and driveways; sidewalks; the location of any new signs; existing and proposed utility locations; building elevations, materials and floorplans, and; landscaping:
  - **Seven (7) copies** of a full-sized plan set drawn to a scale of 1 inch = 20 feet (collated, stapled and folded)
  - **Twenty (20) copies** of the plan set reduced to fit onto 11 X 17-inch paper (collated, stapled and folded)
  - For projects also being reviewed by the **Urban Design Commission**, **twelve (12) additional** 11 X 17-inch copies.
  - **One (1) copy** of the plan set reduced to fit onto 8 ½ X 11-inch paper
- ☒ **REVISED! – Letter of Intent: Twelve (12) copies** describing this application in detail including, but not limited to: existing conditions; the project schedule; names of persons involved (contractor, architect, civil engineer, etc.); details of the project, including proposed uses, building square footage, number of dwelling units, auto and bike parking stalls, etc.; hours of operation; value of land; project cost; any public subsidy requested, and; number of construction and full-time equivalent jobs created. **For projects also being reviewed by the Urban Design Commission, provide twelve (12) additional copies** of the letter.
- ☒ **Filing Fee:** Refer to the Land Use Application Information & Fee Schedule. Make checks payable to: *City Treasurer*.
- ☒ **Electronic Submittal:** All applicants are required to submit copies of all items submitted in hard copy with their application (including this application form, the letter of intent, complete plan sets, etc.) as Adobe Acrobat PDF files on a non-returnable CD to be included with their application materials, or by e-mail to pcapplications@cityofmadison.com.

### In Addition, The Following Items May Also Be Required With Your Application:

- ☒ **Legal Description of Property:** For any application for rezoning, the description must be submitted as an electronic word document via CD or e-mail. For applications requesting rezoning to more than one district, a separate description of each district shall be submitted.
- ☐ For any applications proposing **Demolition or Removal** of existing buildings, the following items are required:
  - Prior to the filing of an application, the applicant or his/her agent is required to notify a list of interested persons registered with the City **30 or 60 days prior to filing** their application using the online notification tool found at: <https://www.cityofmadison.com/developmentCenter/demolitionNotification/>
  - A photo array (6-12 photos) of the **interior and exterior** of the building(s) to be demolished or removed. A written assessment of the condition of the building(s) to be demolished or removed is highly recommended.
  - Approval of a **Reuse & Recycling Plan** by the City's Recycling Coordinator is required prior to issuance of permits.
- ☐ A **Zoning Text** shall accompany all Planned Development District (PD/PCD/PUD) applications.

## 6. Applicant Declarations:

- ☒ **Conformance with adopted City plans:** The site is located within the limits of the Elderberry Neighborhood Development Plan Plan, which recommends Low, Low-Medium, and Medium Density Residential, and Office/Employment for this property.
- ☒ **Pre-application Notification:** Section 28.12 of the Zoning Code requires that the applicant notify the district alder and any nearby neighborhood and business associations in writing no later than **30 days** prior to filing this request. List the alderperson, neighborhood association(s), and business association(s) AND the dates you sent the notices:  
District 9 Alder Paul Skidmore 01/11/13; Neighborhood Outreach communication mailed to 434 Elderberry plan area property owners 2/8/13; host neighborhood Open House informational meetings March 4 & 7, 2013  
→ If a waiver has been granted to this requirement, please attach any correspondence to this effect to this form.
- ☒ **Pre-application Meeting with Staff:** Prior to preparation of this application, the applicant is required to discuss the proposed development and review process with Zoning and Planning Division staff; note staff persons and date.  
Planning Staff: Tim Parks Date: 8/8/12; 9/8/12; 10/4/12 Zoning Staff: Matt Tucker Date: 1/29/13

→ The applicant attests that this form is accurately completed and all required materials are submitted:

Name of Applicant Bob Zoelle, Vice President-Construction, United Financial Group, Inc. Relation to Property Owner Construction Manager for buyer under pending purchase agreement

Authorizing Signature of Property Owner \_\_\_\_\_ Property Owner's consent letter with \_\_\_\_\_ Date 3/5/2013  
authorizing signature is attached  
and incorporated herein

Leo and Carol Ziegler  
5031 Church Road  
Middleton, WI 53562  
(608)831-7853

January 29, 2013

Department of Planning & Community  
& Economic Development  
Madison Municipal Building, Suite LL-100  
215 Martin Luther King Jr. Blvd.  
P.O. Box 2985  
Madison, WI 53701-2985

Re: 9601 Elderberry Road, Madison, WI  
Tax Parcel #070821300971

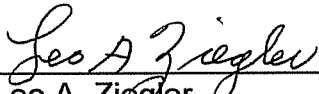
To Whom It May Concern:

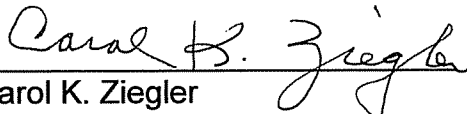
Please accept this letter as our intent to join with United Financial Group, Inc. (construction manager for buyer) and/or MCS Investments, Inc., (buyer), in executing any and all applications for zoning changes, conditional use permits, building permits, sign permits or approvals, necessary or required for contemplated mixed use development of the above-referenced property to the extent our signature, as the legal owner of record, is required.

Please call any of the following if you have any questions.

Bob Zoelle	920-968-8104	<a href="mailto:bobzoelle@ufgroup.net">bobzoelle@ufgroup.net</a>
Ryan McMurtrie	920-968-8137	<a href="mailto:rmcmurtrie@ufgroup.net">rmcmurtrie@ufgroup.net</a>
Judy Husar	920-968-8105	<a href="mailto:jhusar@ufgroup.net">jhusar@ufgroup.net</a>

Sincerely,

  
Leo A. Ziegler

  
Carol K. Ziegler

cc: United Financial Group, Inc.

## **Parks, Timothy**

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**From:** Judy Husar [jhusar@ufgroup.net]  
**Sent:** Thursday, April 25, 2013 4:57 PM  
**To:** Skidmore, Paul; Parks, Timothy  
**Cc:** Lanser Public Affairs LLC; Ryan McMurtrie; Julianne Hein-Swaab; Jon D. McMurtrie  
**Subject:** Elderberry Road - Highlands Community  
**Attachments:** Assessed Fair Market Value Comparison with maps.pdf

Good afternoon Tim and Alder Paul,

Attached please find an analysis that compares the assessed fair market values of homes adjacent to our senior communities in the Milwaukee Metro Area, with those in the Sauk Heights neighborhood. We wanted to provide this to both of you in order to address the concern of the neighbors that their home values would decrease because of our proposed development. Many of the homes included in this analysis were built either simultaneously with, or after our development opened. The backup data, as well as maps showing the locations of the homes in relation to our communities has also been provided.

A worksheet detailing the allocation of the estimated annual real estate taxes upon completion of the proposed Highlands Community has been included within the attachment. The projected annual allocation to the MID-CR Plains School District is \$281,123.74, and \$279,242.59 is projected for the City of Madison.

Thank you for your time, and please let our group know if you have any questions.

*Judy Husar*  
*Vice President*

**United Financial Group, Inc.**  
**660 W. Ridgeview Drive**  
**Appleton, WI 54911**  
Direct (920) 968-8105  
<mailto:jhusar@ufgroup.net>

**Overall Comparison of Assessed and Fair Market Values**

	Community	Total Assessment			Assessor FMV		
		Minimum	Average	Maximum	Minimum	Average	Maximum
<b># of Adjacent Homes</b>							
31	Menomonee Falls	\$186,700	\$395,309	\$505,800	\$182,289	\$385,969	\$493,849
20	Franklin	\$260,100	\$335,610	\$500,700	\$250,578	\$323,324	\$482,370
11	Mequon	\$168,100	\$400,427	\$595,500	\$154,481	\$367,985	\$547,254
32	New Berlin	\$251,100	\$408,731	\$577,500	\$261,890	\$426,295	\$602,315
	Average	<u>\$216,500</u>	<u>\$385,019</u>	<u>\$544,875</u>	<u>\$212,309</u>	<u>\$375,893</u>	<u>\$531,447</u>
<b>Nearest Homes</b>							
56	Sauk Heights	<u>\$298,700</u>	<u>\$365,355</u>	<u>\$463,400</u>	<u>\$305,696</u>	<u>\$373,912</u>	<u>\$474,253</u>

**Allocation of Projected Real Estate Tax Proceeds of Completed Development**

PROPERTY USED FOR CALCULATION				
Parcel Number	Address	Land	Improvements	Total Assessed Value
0708-211-1215-2	9426 Elderberry Rd.	\$90,300.00	\$257,200.00	\$347,500.00

Jurisdiction	Amount	Mill Rate
State of Wisconsin	\$60.47	0.0001740
Dane County	\$996.98	0.0028690
City of Madison	\$3,234.56	0.0093081
MID-CR Plains School District	\$3,256.35	0.0093708
Madison Tech College	\$646.70	0.0018610

*Total Mill Rate:* 0.0235829

Parcel Number	Address	Projected Total Assessed Value of Completed Development
70821300971	9601 Elderberry Rd.	\$30,000,000.00

Jurisdiction	Amount	Mill Rate
State of Wisconsin	\$5,220.43	0.0001740
Dane County	\$86,070.22	0.0028690
City of Madison	\$279,242.59	0.0093081
MID-CR Plains School District	\$281,123.74	0.0093708
Madison Tech College	\$55,830.22	0.0018610

*Totals:* \$707,487.19 0.0235829

LAND USE APPLICATION  
AND  
SUBDIVISION APPLICATION  
SUBMITTED – MARCH 6, 2013



**Highlands Community**  
**9601 Elderberry Road**  
**Madison, Wisconsin**

Tax Parcel Number: 070821300971



Applicant: United Financial Group, Inc.  
Contact: Bob Zoelle  
Address: 660 W. Ridgeview Drive  
Appleton, WI 54911  
Phone: (920)968-8104



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March 5, 2013

Mr. Steven Cover  
Director  
Department of Planning & Community & Economic Development  
City of Madison  
215 Martin Luther King Jr. Blvd., Room LL 100  
Madison, WI 53701

RE: **Highlands Community Concept Plan – Letter of Intent  
Zoning Request**  
MAP AMENDMENT FROM AGRICULTURAL TO TR-U1  
(TRADITIONAL RESIDENTIAL - URBAN DISTRICT 1), and  
**Preliminary Subdivision Plat**

Dear Mr. Cover:

This Letter of Intent is submitted together with the applications, filing fees, and required submittal items for staff, plan commission, and common council consideration for approval of a zoning amendment and a preliminary subdivision plat.

## **Introduction**

United Financial Group, Inc. (UFG) is requesting a zoning assignment of TR-U1 (Traditional Residential-Urban District 1) for 33.2584 acres of land located at 9601 Elderberry Road within the south central portion of the Elderberry Neighborhood Development Plan on the west side of Madison for its proposed Highlands Community Concept Plan that would guide the phased development of a mixed-use residential community. UFG is seeking a simultaneous approval of a preliminary plat to create six (6) lots for the residential development components, two (2) outlots for storm water management and open space, and one (1) lot for future commercial-employment with possible residential buffer contemplated in the southwest corner of the concept plan.

The Highlands Community development would include an integrated variety of residential housing options for all ages with upscale finishes and amenities providing for walkability and continuity with the surrounding neighborhood. After approval of the zoning and preliminary plat, UFG would pursue a conditional use permit to construct four 36-unit buildings of Market Rate Rental Residences and the Community Center proposed to be located within the southeast corner of the property, with the intent to start construction of phase one and the Community Center in 2014. In conjunction with the first phase of development occurring in the southeast corner, UFG is prepared to commit to improving all of Bear Claw Way public street improvements from Wilrich Road north to Elderberry Road.

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## Project Information

### ***Applicant***

United Financial Group, Inc.  
660 W. Ridgeview Drive  
Appleton, WI 54911

### ***Property Owner***

Leo A. and Carol K. Ziegler  
5031 Church Road  
Middleton, WI 53562

**Agent:** Bob Zoelle, Vice President-Construction

United Construction & Development division United Financial Group, Inc., Construction Manager

### ***Design Team***

#### ***Architect:***

AG Architecture  
1414 Underwood Ave  
Wauwatosa, WI 53213  
Phone: (414)431-3131  
John Cronin, AIA  
[Jjcron@Agarch.com](mailto:Jjcron@Agarch.com)

#### ***Site Engineer:***

Trio Engineering  
1700 W. Capitol Drive  
Brookfield, WI 53045  
Phone: (262)790-1480  
Mobile Phone: (414)801-2122  
Facsimile: (262)790-1481  
Josh Pudelko, M.S., P.E.  
[JPudelko@Trioeng.com](mailto:JPudelko@Trioeng.com)

#### ***Building Engineer:***

Schuler & Associates, Inc.  
2711 N. Mason Street, Suite F  
Appleton, WI 54914  
Phone: (920)734-9107  
Facsimile: (920)734-4610  
Jeffrey T. Rustick, P.E.  
[JTR@Schulerassociates.net](mailto:JTR@Schulerassociates.net)

#### ***General Contractor/Construction Manager:***

United Construction & Development division  
United Financial Group, Inc.  
660 W. Ridgeview Drive  
Appleton, WI 54911  
Phone: Toll-free 1-(877)968-8100  
Facsimile: (920)731-1696  
Bob Zoelle, Vice President-Construction  
Direct Dial: (920)968-8104

#### ***Landscape Architect:***

Garland Alliance, Inc.  
P. O. Box 11913  
Shorewood, WI 53211  
Phone: (877)672-8687  
Tim Garland, RLA  
[tim@gardensbygarland.com](mailto:tim@gardensbygarland.com)

#### ***BZoelle@UFGGroup.net***

Judy Husar, Vice President-Financial Operations  
Direct Dial: (920)968-8105  
[JHusar@UFGGroup.net](mailto:JHusar@UFGGroup.net)  
Ryan McMurtrie, Vice President-Development  
Direct Dial: (920)968-8137  
[RMcmurtrie@UFGGroup.net](mailto:RMcmurtrie@UFGGroup.net)  
Jon D. McMurtrie, Chairman  
Direct Dial: (920)968-8101  
[JMcMurtrie@UFGGroup.net](mailto:JMcMurtrie@UFGGroup.net)

## EXISTING CONDITIONS

**Aldermanic District:** District 9; Alder Paul Skidmore

**Notifications/Meetings**

August 8, 2012	Pre-application discussion with Planning and Engineering Departments
September 18, 2012	Pre-application discussion with Planning Department
October 4, 2012	Pre-application discussion with Planning Department
January 11, 2013	Notice to Alder Skidmore
January 29, 2013	Pre-application discussion with Planning and Zoning Departments
February 6, 2013	Urban Design Commission Informational Presentation
February 8, 2013	Neighborhood Outreach Letter
March 4/7, 2013	Neighborhood Informational Open House Meetings

**Legal Description:** See attached Exhibit A

**Square Footage (Acreage) of Site per Preliminary Plat:** 40.10 Acres

**Existing Land Use:** Farm land, No Structures

**Existing Zoning:** Agriculture

**Adopted Neighborhood Plan:** Elderberry Neighborhood Development Plan

**Development Schedule:** 2014 Construction Start-Phase 1

## APPLICANT BACKGROUND

United Financial Group, Inc. ("UFG") is the construction manager pursuant to a purchase contract with property owners Leo and Carol Ziegler. Founded in 1978, UFG is a Wisconsin business with its focus being in the design, construction, and operation of residential housing communities with a primary emphasis being the specialized active senior retirement living market under the name Highlands Communities (HighlandsCommunities.com). UFG is a hands-on owner and operator committed to creating long-term investments and value in each community where it operates, which is validated by a successful track record and well-balanced expansion. Their strong financial base has allowed for continual annual development in Wisconsin for 30 years, including the 2008-2010 contraction period, when others were unable to fund construction. Today the principals of UFG own and operate a portfolio of over 3,400 living units in 16 locations throughout central, southeastern and north-central Wisconsin. UFG has a multidisciplinary team that exclusively services its affiliates providing professional property management; accounting, tax and financial planning; new development and construction management services; and mortgage administration. UFG strives to provide residents with high quality at an exceptional value and a living experience that exceeds expectations. References and additional development experience are included in the application submittal. UFG has a solid reputation as prompt payers with construction subcontractors and vendors and has never missed a single payment or

defaulted on any loan throughout its history. Please feel free to contact any of the banking and municipal contacts for references.

## PROJECT DESCRIPTION

**Existing Site:** The Elderberry Neighborhood Development Plan, adopted in 2002, is bounded by Pioneer Road on the west, Mineral Point on the south, Pleasant View Road on the east, and Old Sauk Road on the north. The Ziegler site encompasses a total area of approximately 38.16 acres and is located south of Elderberry Road within Phase II of the Elderberry neighborhood plan. The site neighbors include the Woodstone Subdivision to the east, the Blackhawk Church Town Center Plat to the south, Sauk Heights development to the northeast, and land owned by the Town of Middleton to the west. The site is located in the Middleton-Cross Plains School District.

The Elderberry neighborhood is generating new momentum. Woodstone Subdivision's developer has proposed a re-plat and plans to focus on construction of the remaining land in 2013. Elderberry Road is planned for extension to the east in 2013 to improve connections to the surrounding area. The potential for a key access point connection to the south at Mineral Point Road appears to be on the horizon. Other public road way improvements and development projects in the surrounding areas have been proposed. UFG's development would contribute to the renewed enthusiasm being created.

**General Project Description:** Guided by the goals and objectives of the Elderberry Neighborhood Development Plan, UFG's development team set out to create a cohesive mixed-use residential site design. UFG has been involved in communications along with exploring multiple site and building concept designs with city planning staff since August of 2012 and has worked to refine the site and building designs in response to staff's feedback. The current Highlands Community Concept Plan consists of 390 living units and five different housing components in a livable community appealing to all ages. Excluding the 24 for-sale condominium residences for all ages proposed for the northeast portion of the site, 46% (169 residences) would be reserved for active independent age-qualified seniors 55 and beyond within the Senior Living Residences and Senior Townhomes, and 54% (197 residences) would be available to residents of any age in the Single-Family Attached Row houses and Rental Residences. The required parking for all housing components was achieved with the majority of this parking protected from the weather and located in the underground parking garages or attached surface garages. Convenient required guest surface parking and guest bicycle parking is available across the site. Construction would be staged in building phases over time, and the development is planned to be conventionally financed.

The internal street pattern is grid-like with the main entrance from Elderberry Road provided by an extension of Bear Claw Way with a connection at the southeast border of the site to Wilrich Street. Public sidewalks align both sides of all streets to allow residents to easily move throughout the community. The street system design features are consistent with the goals and objectives contained in the neighborhood plan. The Elderberry neighborhood plan calls out a future extension of Bear Claw Way from Wilrich Street to the south to make a key access point connection at Mineral Point Road where a future neighborhood activity center is planned to be located. Alder Skidmore is an advocate of the future extension of Bear Claw Way to Mineral Point and views this as an important improvement to the overall north-south connectivity of the existing Elderberry neighborhood and adjacent Blackhawk neighborhood to the north. This connection would also improve life-safety response times for

emergency vehicles and be an important part of the Highlands Community proposal and future development proposals. Alder Skidmore is facilitating staff discussion to see that the road is planned, designed, and constructed in a timely manner to accommodate the existing, proposed, and future developments in this neighborhood.

**Senior Rental Residences:** The north-central portion of the site plan contains a 3-story single building cluster with 145 active independent senior residences with a centrally located 5,000 square foot community center, including a four season room, hearthside room, multipurpose meeting areas, exercise facility, library/computer room, guest suite, billiards room, two elevator locations, and heated underground parking with interior refuse/recycle collection area. The community center is centrally located where all residents have direct interior access. Two elevators will access each floor level, as well as the heated underground parking. The architectural features of the community center contribute to the overall main entrance statement and its location is purposefully oriented to Elderberry Road. The large window details enhance and complement the entrance and provide for bright and energetic spaces. This amenity would be shared with the adjacent Senior Townhomes to the west. The common area amenities reflect the Highlands Communities priority of fostering resident interaction and are designed to enrich the quality of the lives of the residents and their visitors.

The building architecture will consist of time-enduring brick masonry with accents, fluted columns, pre-cast window accents, and attractive building offsets. UFG has transitioned in the past years to building contiguous communities which provide all residents with direct access to the interior amenity areas, as they are preferred by the residents. The two northern driveways from Elderberry Road provide access to the main entrance for prospective residents, visitors, service providers, and emergency vehicles. Driveway access points from Spirit Street and Bear Claw Way provide residents access to the underground parking and allow for refuse collection accessed from the overhead garage door. All required resident bike parking would be provided for in the underground parking garage, whereas guest bicycle parking is provided in the courtyard.

The living units range in size from 700 square feet to 1,400 square feet and feature a full kitchen complete with energy efficient appliances, individual gas heat and central air conditioning, a patio/balcony, 9 foot ceilings with some having cathedrals, laundry hook-ups, pull chain help-call system in each bathroom, and individual private locked storage on each of the main floors. An additional large item and seasonal storage area would be available to residents in the underground parking garage. The building and site would be extensively landscaped to create a residential community that has an arboretum type setting. Landscaping design details are located on page 11.

Based on UFG's experience in owning and operating senior communities for over 25 years, early to mid-70's is a representative entry age, and the average age is early 80's, with at least 50% of the new residents transitioning from single family homes and choosing the Highlands Communities lifestyle. An example of the social activities offered would include cards, Wii bowling, bingo, potlucks, movies, and monthly themed parties. Health related and wellness activities such as foot clinics and blood pressure checks would be presented on a monthly basis at the community center. Common trips outside of a Highlands senior community include, as examples, Performing Arts Center events, and shopping trips. UFG's property management division would provide professional property management services. Operation and staffing details are located on page 11.

Senior Rental Residences			Total
Residence Mix	Mix Count	Total No. Bedrooms	Buildings
One Bedroom/One Bath	27	27	
One Bedroom/One Bath/Den	3	3	
Two Bedroom/One Bath	26	52	
Two Bedroom/Two Bath	58	116	
Two Bedroom/Two Bath/Great Room	<u>31</u>	<u>62</u>	
Total	145	260	1

**Senior Townhomes:** Transitioning to the west are smaller massed senior townhomes with private entrances and direct-entry two-car garages that are oriented away from Public Street A. This senior townhome component consists of 24 units contained within three 8-unit, two-story buildings. Two alternative 2 BDRM/2 BTH floor plans will be provided, ranging in size from 1,100 to 1,400 square feet. Based on UFG's experience, these units attract younger seniors who prefer the simplicity and freedom of a senior rental community, but desire the privacy and amenities associated with a single family home. The exterior architecture will consist of both brick masonry and composite siding. Refuse/recycle areas are located on the site plan in the shared drive access areas of the buildings and would be contained within surround structures constructed to City of Madison standards. Required resident bicycle parking would be accommodated within each unit 2-car garage. Refuse collection structures and guest bicycle parking areas are centrally located both to the north and south of the center building's shared access drives at the westerly edge of the asphalt pavement.

Senior Townhomes		Total No. Bedrooms	Total	Total	Total No. Bedrooms
Residence Mix Per Building	Mix Count	Per Building	Buildings	Residences	On Lot
Two Bedroom/Two Bath	8	16	3	24	48

**Condominiums:** The northeast portion of the site plan reflects 24 single story condominiums comprised of four 4-unit buildings and four 2-unit buildings. In response to suggestions made by the UDC, the buildings have been thoughtfully re-oriented so no garages are visible from Elderberry Road which also minimized driveway access to Elderberry Road reducing the impervious surface area and improving the traffic flow pattern in this corridor. This design update created the opportunity to locate a centralized gathering/garden outdoor living centerpiece for the condominium component. The exteriors would consist of two different colors of brick, stone accented fireplaces, and gables with composite siding. The floor plans are 2 BDRM/2 BTH, with living areas ranging from 1,617 to 1,676 square feet, and include a den, 2-car garage, fireplace, and a large patio. Refuse/recycle areas would be contained within the garages with street pick up. Required resident bicycle parking would be accommodated within each unit 2-car garage. Centralized guest bicycle parking areas are located adjacent to the outdoor living centerpiece area north of Spirit Street and at the southern edge of the shared access drive between the two condominium buildings south of Spirit Street. This housing type serves as a transition from the single family homes to the east.

Condominiums	Mix Count	Total No. Bedrooms	Total	Total	Total No. Bedrooms
Residence Mix Per Building	Per Building	Per Building	Buildings	Residences	On Lot
Two Bedroom/Two Bath	4	8	4	16	32
Two Bedroom/Two Bath	2	4	<u>4</u>	<u>8</u>	<u>16</u>
Total			8	24	48

**Single-Family Attached Row house:** The central portion of the site is planned for 53 three-story row houses contained in three 8-unit buildings, two 7-unit buildings, and three 5-unit buildings. The exteriors consist primarily of three different colors of brick, with composite siding and pre-cast stone accents and headers. The urban street design allows the buildings to be oriented to the surrounding streets on all sides. The residences consist of two different 2 BDRM/3 BTH floor plans, with living areas ranging in size from 2,083 to 2,630 square feet, with 2-car garages on the first floor that are accessed by means of an alley. The second floor in both unit types serves as the primary living area and contains the dining room, living room, and kitchen, as well as an additional gathering area in the larger floor plan. The third floor in each unit type offers two bedrooms, two bathrooms and laundry areas. Stairs within each residence provide access to each floor. Refuse/recycle areas would be contained within the garages with alley pick up. Required resident bicycle parking would be accommodated within each 2-car garage.

Single Family Attached Row House	Mix Count	Total No. Bedrooms	Total	Total	Total No. Bedrooms
Residence Mix Per Building	Per Building	Per Building	Buildings	Residences	On Lot
Two Bedroom/Two and 1/2 Bath	5	10	3	15	30
Two Bedroom/Two and 1/2 Bath	7	14	2	14	28
Two Bedroom/Two and 1/2 Bath	8	16	<u>3</u>	<u>24</u>	<u>48</u>
Total			8	53	106

**Rental Residences:** Four thirty-six unit buildings containing market-rate rental residences with elevators, underground parking, surface garages, and surface parking are positioned in the southeast portion of the site. The buildings are oriented to the surrounding streets, while the parking is centrally located. The exteriors will consist primarily of two different colors of brick, with stone and composite siding accents. These market rate residences will consist of 33% 1,400 sq. ft. two bedroom/two bathroom corner units with large private balcony/patio; 33% 850 sq. ft. one bedroom; 19% two bedroom/one bathroom; and 15% 1,150 sq. ft. two bedroom/two bathroom residences. A 4,000 square foot amenity Community Center oriented south of Public Street B would service both the row houses and the four rental residence buildings. This center would house a fitness center, business center, TV room, gathering room, kitchen/dining room, playroom/conference room, restrooms, a property management office, and a leasing office. Refuse/recycle areas are located in the underground parking. Shared building driveways provide residents access to the underground parking and allow for refuse collection accessed from the overhead garage door. Approximately 60% of the resident bicycle parking requirements would be located in the underground parking within a secured area with the remaining

40% contained within the surface garages. Four (4) guest bicycle parking areas are centrally located within 100' of each building's main entrance to comply with the zoning code.

Rental Residences	Mix Count	Total No. Bedrooms	Total	Total	Total No. Bedrooms
Residence Mix Per Building	Per Building	Per Building	Buildings	Residences	On Lot
One Bedroom/One Bath	12	12		48	48
Two Bedroom/One Bath	7	14		28	56
Two Bedroom/Two Bath	17	34		68	136
Total	36	60	4	144	240

Five Housing Components Total	Mix Count	Total No. Bedrooms	Total No. Buildings
Residence Mix			
One Bedroom/One Bath	75	75	
One Bedroom/One Bath/Den	3	3	
Two Bedroom/One Bath	54	108	
Two Bedroom/Two Bath	227	454	
Two Bedroom/Two Bath/Great Room	31	62	
Total	390	702	24

**Total Gross Square Footage of Residential Buildings: 782,277 Square Feet**  
(all building areas proposed for residential use related to the operation of the community)

Building Square Footages								
	Basement	Garage	2-Car Tandem Garage	1st Floor	2nd Floor	3rd Floor	Total 1st, 2nd, 3rd Floor	Total
Senior Rental Residences	64,741	0	0	66,039	64,077	64,651	194,767	259,508
Senior Townhomes	0	9,645	0	13,749	18,648	0	32,397	42,042
Condominiums	0	14,248		39,752			39,752	54,000
Row Houses	0	17,316	11,696	24,069	53,081	53,488	130,638	159,650
Rental Residences	62,816			62,324	62,324	62,324	186,972	249,788
Garages-Rental Residences	0	13,641	0	0	0	0	0	13,641
Community Center	0	0	0	3,648	0	0	3,648	3,648
Total	<u>127,557</u>	<u>54,850</u>	<u>11,696</u>	<u>209,581</u>	<u>198,130</u>	<u>180,463</u>	<u>588,174</u>	<u>782,277</u>

**Capacity For Places of Assembly:**

Senior Rental Residence: Four Seasons / Hearthside  
Area: 2,100 S.F. Occupants: 140

Rental Residences/Row house Community Center  
Fitness Room: 637 S.F. Occupants: 13  
Other Common Areas: 1,666 S.F. Occupants: 111  
124

**Parking:**

**Parking Summary  
Code Requirement:**

Minimum= 1 Per Dwelling; Maximum = 2.5 Per Dwelling Unit

	Number of <u>Residences</u>	<u>Underground</u>	<u>Surface</u>	<u>Garages</u>	<u>Total</u>	Total Per Dwelling <u>Unit</u>	Surface <u>HC</u>
Senior Rental Residences	145	145	37	-	182	1.26	2
Senior Townhomes	24	-	-	48	48	2.00	
Condominiums	24	-	-	48	48	2.00	
Row Houses	53	-	-	106	106	2.00	
Rental Residences	144	144	88	54	286	1.99	8
Community Center							
<b>Total</b>	<b><u>390</u></b>	<b><u>289</u></b>	<b><u>125</u></b>	<b><u>256</u></b>	<b><u>670</u></b>		<b><u>10</u></b>

**Bike Parking**

Code Requirement: 1 Per Dwelling Unit up to 2 Bedrooms;  
1/2 Space Per Additional Bedroom;  
1 Guest Space Per 10 Dwelling Units

	<u>Underground</u>	<u>Surface</u>	<u>Garages</u>	<u>Total</u>
Senior Rental Residences	145	15	-	160
Senior Townhomes	-	10	24	34
Condominiums	-	3	24	27
Rowhouses	-	-	53	53
Rental Residences	-	16	144	160
Community Center				
<b>Total</b>	<b><u>145</u></b>	<b><u>44</u></b>	<b><u>245</u></b>	<b><u>434</u></b>

**Maintenance Equipment Storage and Snow Removal:** Designated maintenance equipment storage areas would be located within the underground parking garages of the Senior Residence Building and the Rental Residence Buildings. Snow storage areas are available throughout the site. The southwest corner of the site would be available for excess snow storage.

**Utilities:**

**Sanitary Sewer:**

The proposed Highlands Community residential development is situated in the Elderberry Neighborhood Sewer Area and receives sanitary sewer service from the Woodstone Subdivision located immediately east of the site. The northern half of the development will connect to the existing 8" diameter sanitary sewer at the western terminus of Spirit Street; the southern half of the development will connect to the proposed 8" diameter sanitary sewer planned to extend to the intersection of Bear Claw Way and Cobalt

Street in the southeast corner of the development. The sanitary sewer system serving this development has adequate capacity to accommodate the peak sewer flows from the proposed development. Note that the "Future Commercial – Employment with Possible Residential Buffer," located in the southwest corner of the property, drains to the southwest and falls into another Impact Fee District for both sanitary sewer and stormwater; development of this area is anticipated to occur once a separate sanitary sewer service is extended to this area from the southwest.

Watermain:

The proposed development includes a network of looped 8" diameter public watermain located in the public streets, connecting to the existing 8" diameter watermain stubs terminating along the west perimeter of the Woodstone Subdivision at Elderberry Road and Spirit Street. The proposed watermain is also planned to connect to the future watermain that will be extended to the southeast corner of the development by the next phase of the Woodstone Subdivision. Fire hydrants are located at all street intersections, incrementally along larger blocks, and near main entrances to the residential rental residence buildings.

Storm Sewer:

The proposed development will install public storm sewer in the public streets to convey stormwater runoff to the wet detention pond located on the west side of Bear Claw Way in the southeast corner of the site. The wet detention pond will discharge via an outlet structure and storm sewer pipe to the infiltration basin proposed on the east side of Bear Claw Way. The outlet structure for the infiltration basin ultimately discharges to the stormwater drainage outlot in the southwest corner of the Woodstone Subdivision. Private storm sewer inlets will connect runoff from the various blocks within the development and will provide overflow runoff relief from the rain gardens and biofilters planned within the development.

Gas/Electric/Telephone Service:

Gas, electric and telephone service was extended to the eastern perimeter of the development by the Woodstone Subdivision. The proposed Highlands Community anticipates connecting to these services and extending through the limits of the phased development in accordance with plans to be development by the utility service providers.

**Stormwater Management:** The existing site is relatively level with a discernable slope towards the southeast corner of the property, ultimately discharging to a drainage Outlot in the adjacent Woodstone subdivision. The proposed stormwater management plan will maintain the current site drainage patterns and will utilize a variety of stormwater management practices to achieve the desired goals. A large wet detention pond and large infiltration basin will be located on opposing sides of Bear Claw Way in the southeast corner of the property; these practices will provide a majority of the sediment control, oil and grease control, peak runoff rate control, and infiltration/groundwater recharge for the development. The stormwater management plan also proposes the use of rain gardens near select buildings across the site to promote localized infiltration and groundwater recharge.

The large wet pond located in the east portion of the property west of Bear Claw Way is designed to serve as a neighborhood amenity and landscaping detail. The Outlot 2 pond area open space located north and south of this pond will be treescaped and planned as dedicated parkland outdoor recreation area for the community. The depth of the wet pond will allow stocking of fish.

**Landscape:** The design intent for this multi-faceted development community creates a sense of community and arboretum quality gardens for its residents. The overall site is broken down into quadrants by the strong use of street tree planting using rare and unique tree types. Within these quadrants, the buildings become a part of the garden and layered plantings are scaled for the particular building type. Plants have been selected not only for seasonal interest, but more importantly, a cohesive selection of natives accented with premier (and not often used in the large scale development setting) garden type plants. Standard "commercial" type plants were avoided.

Additional design features include bike racks, rain gardens, community gardens, adult/children outdoor play areas, gazebo, walking paths, benches, exercise areas and bird house/feeders.

Ornamental grasses dominate the gardens and naturalized areas embrace the buildings and gardens blurring the distinction between a manicured commercial look and a natural area. The result is a residential community that has an Arboretum type setting.

**Signage:** Masonry project identification signs are proposed including brick pillars located along Elderberry Road at the main entrance to the Senior Living Residences and north and south of the intersection at Bear Claw Way and Spirit Street. Landscaping enhancements will complete the entrance presentation of the signage.

**Construction Management and Operating Plan:** The Highlands Community operating concept, marketing plan, and property management plan, as well as the design and proposed phased construction of buildings is modeled after UFG's 10 other successful Highlands Communities. Construction will be done by UFG's construction division as it has been for 30 years. The construction management team will include an on-site, full-time superintendent employee of UFG to effectively manage day-to-day activities of subcontractors and to work with UFG's property management team on transition of the completed project over the course of phased construction. UFG is experienced with its costs, methods of construction and market demand for their building product. The buildings will be professionally managed by UFG's management team that uses a well-developed proven marketing approach in conjunction with their knowledge base of operations and systems for successful long-term operation. Construction would be staged in building phases over time, and the development is planned to be conventionally financed. An estimate of 40-60 construction jobs would be created. Equity in the project is secured and would be provided by UFG principals, and construction financing is available under existing revolving loan agreements with US Bank and Associated Bank.

	Senior Living Components-169 Residences	Market Rate Components - 197 Residences
Hours Of Operation:	Monday - Saturday: 10am - 4pm	Monday - Friday: 9am - 5pm Saturday: 10am - 4pm Sunday: By Appointment
Job Creation/Staffing:	1 Director 1 Administrative Assistant 1 Leasing Agent (approx. 6 hours/week) 1 Maintenance Person 1 Cleaner	1 Property Manager 1 Leasing Agent 2 Maintenance Person 1 Cleaner

**Social and Economic Impacts:** This development will have a positive social and economic impact. The variety of housing options to be offered would address the housing needs for all ages within the community, and specifically, the senior demographic and the high-end rental residence market. The undisputed senior population growth projections, as documented by the Wisconsin Department of Administration (12/2006), project a +110% increase in Dane County's age 65 and over during the next 20 years from 48,854 in 2010 to 75,815 in 2020 and to 103,021 in 2030. The projected additional tax base would exceed \$30,000,000 dollars generating in excess of \$700,000 of annual tax revenue with some impact to the school district and limited use of municipal services. The 2012 assessed value of the parcel was \$95,600 generating 2012 net real estate taxes of \$2,255. The estimated potential impact to the Middleton-Cross Plains School District at completion of the development is presently estimated at 0.6 to 0.7 children per residence, or approximately 132 to 155 children, excluding the senior living building and senior townhomes that will not have school age children. It would be a positive financial impact to the community if the tax burden on the citizens were lessened by quality new development increasing the tax base. Local City of Madison residents would benefit by the contribution to the city real estate tax burden, the creation of business opportunities for supportive services, permanent employment of the Highlands Community on-site maintenance, leasing, and administrative staff, and substantial construction employment created during the build out of the Highlands Community.

**Concluding Statements:** UFG is a 35-year experienced Wisconsin for-profit tax base contributor owner and operator of senior and non-senior living communities. The strong financial structure of UFG has allowed continued development and expansion even during the last several years when construction and real estate financing was not available for many Wisconsin development opportunities. This proposed Highlands Community, as is true with all UFG developments, will be wholly owned by the McMurtrie-Salmon principals of UFG and all construction and property management services will be provided by United Financial Group, Inc. Financial and community reference contacts have been provided in this submittal.

Thank you for your time in reviewing our proposal. Should you have any questions, please call on us toll-free at (877) 968-8100 ext. 104, 137, 105, or 101.

Sincerely,

Bob Zoelle  
Vice President  
Construction  
Extension 104

Ryan J. McMurtrie  
Vice President  
Development  
Extension 137

Judy Husar  
Vice President  
Financial Operations Officer  
Extension 105

Jon D. McMurtrie  
Chairman  
Extension 101

## **CONSTRUCTION AND MANAGEMENT TEAM EXPERIENCE**

### **EXPERIENCE IN BUILDING AND OPERATING SENIOR HOUSING COMMUNITIES**

United Financial Group, Inc. (UFG) is owned by Jon D. McMurtrie, Ryan J. McMurtrie, and Douglas D. Salmon, was incorporated during 1978, and celebrated its 35th anniversary during 2013. The company grew from 0 to 1500 housing units by 1988 and transitioned from acquisition to design and development in 1984. It is responsible for the acquisition and/or construction and financing of over 3,400 housing units in 19 Wisconsin projects located in Appleton, Menasha, Neenah, Waupaca, Green Bay, De Pere, Weston (Wausau), West Allis, Brookfield, New Berlin, Menomonee Falls and Franklin.

Substantially all construction during the last 25 years and planned for the future consists of senior communities geared to independent active seniors age 55 and older in 11 Wisconsin communities. Over 90% of the 2,990 units designed and built by UFG consisting of 2,730 units now in 12 projects, were designed, built, and are operated exclusively for senior residents under the name Highlands Communities. The 11 Wisconsin communities are:

		<b>Completed Units in Operation through 2013</b>		<b>Approved Project Size</b>
Brookfield Highlands	Brookfield, WI	520 Units	Opened 1989	520 Units
Parkwood Highlands	New Berlin, WI	238 Units	Opened 1989	238 Units
Ridgeview Highlands	Appleton, WI	525 Units	Opened 1993	585 Units
Wildwood Highlands	Menomonee Falls, WI	367 Units	Opened 1997	367 Units
Highlands at Wildwood Lake	Menomonee Falls, WI	128 Units	Opened 2007	169 Units
Nicolet Highlands	De Pere, WI	144 Units	Opened 1999	144 Units
Foresthill Highlands	Franklin, WI	278 Units	* Opened 2002	620 Units
Parkway Highlands	Green Bay, WI	210 Units	Opened 2002	417 Units
Birchwood Highlands	Weston, WI	152 Units	Opened 2008	212 Units
Highlands At Mahler Park	Neenah, WI	101 Units	Opened 2009	191 Units
Highlands at Riverwalk	Mequon, WI	38 Units	* Opening 8/2013	96 Units
Highlands at River Crossing	Winneconne, WI	29 Units	* Opening 7/2013	39 Units
		<b>2,730 Units</b>	*	<b>3,598 Units</b>

\*Includes 83 total units in construction opening 2013

UFG has utilized a consistent architectural design for each of the 12 senior communities described above now consisting of 2,730 units growing to over 3,598 senior housing units. During the last 25 years, UFG has refined and copyrighted various building designs, marketing plans, and management practices for the specialized active senior housing market. All senior communities utilize a mixture of floor plan designs including 700 square foot one bedroom-one bath units, 850-950 square foot two bedroom-one bath units, 1,000-1,100 square foot two bedroom-two bath units, and 1,200 – 1,400 square foot two bedroom-two bath great room units with fireplaces. Amenities include heated underground parking, elevators, secured entrance, help-call systems in every bathroom, large community center gathering areas, and personalized on-site professional property management. All senior communities have utilized the traditional Jeffersonian architectural design with fluted columns and an enduring 100% brick masonry exterior.

### **MANAGEMENT EXPERIENCE**

UFG now has a core home office staff of 18 associates with an average of 15 years of experience with UFG, exclusive of the on-site property management staff of about 200 full and part-time individuals. Half of UFG's home office staff members support the property management division and its accounting. The other half support development, construction management, finance, tax and financial planning.

UFG manages all 3,400+ housing units developed and acquired by UFG including the senior communities described above. In addition to the experience of the principals Jon D. McMurtrie, Ryan J. McMurtrie, and Douglas D. Salmon, the management team has been successful in the marketing experience in bringing on over 3,000 Wisconsin newly constructed housing units into successful operation.

Jon D. McMurtrie is age 60 and received a Bachelor of Business Administration Degree with a major in Accounting from the University of Wisconsin-Whitewater. Jon is a licensed Certified Public Accountant and has been involved in investments including investments in housing complexes since 1971. Douglas D. Salmon is age 73 and received his Bachelor of Business Administration Degree with a major in Economics from the University of Iowa. His business and investment experience includes ownership in housing since 1971. Ryan McMurtrie is a graduate of the University of Wisconsin-Madison with a Real Estate and Finance degree. He has two years of experience with Goldman Sachs Real Estate division in Dallas, Texas prior to return to United Financial Group in February, 2010.

**United Financial Group, Inc.**  
**REFERENCES – March 2013**

**LENDERS**

Mr. David L. Blohm, President American National Bank-Fox Cities 2200 N. Richmond Street Appleton, WI 54911 (920) 739-1040 Banking relationship since 1994	Craig O. Henes Vice President Commercial Lending Associated Bank, N.A. 330 E. Kilbourn Avenue, Third Floor Tower Two Milwaukee, WI 53202 (414) 283-2244 Banking relationship since 1983	Ms. Mary Wright, Director Multifamily Housing Group Mr. Bill Boerigter, Manager Mr. Shreedhar Ranabhat, Asst Manager Wisconsin Housing and Economic Development Authority P. O. Box 1728 Madison, WI 53701-1728 (608) 267-1450; (608) 267-7749 Lending relationship since 1992	Mr. James M. Cope Senior Vice President Walker & Dunlop 142 E. Capitol Drive / Suite 200 Hartland, WI 53029 (262) 912-7071 Lending relationship since 1994
Mr. Michael J. Nickels Regional Market President US Bank, N.A. P. O. Box 2819 Appleton, WI 54913-2819 (920) 830-6020 Banking relationship since 1984	Mr. Daniel J. Nisler Executive Vice President American National Bank-Fox Cities 2200 N. Richmond Street Appleton, WI 54911 (920) 739-1040 Banking relationship since 1981	Fred E. Welker IV Mortgage and Real Estate Department Lincoln Financial Group 100 N. Greene Street Greensboro, NC 27401 (336) 691-4641	Kelli Carhart Freddie Mac Central Region 333 W. Wacker Drive, Suite 2500 Chicago, IL 60606 kelli_carhart@freddiemac.com

**LAND SELLERS**

Mr. Vincent J. Baum N 2987 Herman Lane Hortonville, WI 54944 Sold 57 acres land in Appleton 06/18/91	Mr. Gerald Hemmerich 8462 Cty Hwy BC Sparta, WI 54656 Sold 20 acres land in Menomonee Falls 08/27/97	Ms. Paulette Manfrin 2301 Summit Avenue Waukesha, WI 53186 (262) 650-9880 Sold 80 acres land in Menomonee Falls 04/18/95	John and Robert Kukuwich W245 S6015 Red Wing Drive Waukesha, WI 53189 Sold 54 acres land in Franklin, WI 08/06/98
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**GOVERNMENTAL AGENCIES APPROVING DEVELOPMENTS**

Mr. Robert Buckingham, Community Development Director Town of Grand Chute, WI (920) 832-1599 Zoning and Site Plan Approvals – Ridgeview Highlands & single family plat Zoning and Site Plan Approvals – Meadow Creek Townhomes	Ms. Jane F. Carlson, Town Clerk – Brookfield, WI (262) 796-3788 Mr. Gary Lake, Building and Zoning Administrator (262) 796-3790 Site Plan Approvals – Brookfield Highlands
Mr. Matt Carran, Director of Community Development Village of Menomonee Falls, WI (262) 532-4274 Rezoning and Site Plan Approvals – Wildwood Highlands and Wildwood Lake	Mr. Jack Chiovatero, Mayor, City of New Berlin, WI (262) 797-2441 Zoning and Site Plan Approvals – Parkwood Highlands and single family plat
Mr. Ken Pabich, Planning and Economic Development Director City of De Pere, WI (920) 339-4043 Nicolet Highlands selected by De Pere's Redevelopment Authority from five competitive senior housing proposals	Mr. John M. Bennett, City Engineer, Franklin, WI (414) 425-7510 Zoning and Site Approvals – Foresthill Highlands and single family plat Single family subdivision completed and sold out during 2003.
Mr. Robert Strong, Community Development Director City of Green Bay, WI (920) 448-3413 Zoning and Site Plan Approvals for Parkway Highlands	Mr. Chris Haese, Community Development Director Ms. April Kroner City of Neenah (920) 886-6125 Site Plan Approvals – The Highlands At Mahler Park
Mr. Keith Donner, Interim Administrator/ Public Works Director Village of Weston (715) 241-2610 Ms. Jennifer Higgins, Community Development Director (715) 241-2638 Site Plan Approvals – Birchwood Highlands	Mr. John Rogers, Village President – Winneconne (920) 582-4381 Site Plan Approvals – Highlands at River Crossing
Ms. Kim Tollefson, Director of Community Development City of Mequon (262) 236-2903 Mr. Jac Zader, Asst. Director of Community Development (262) 236-2904 Site Plan Approvals - Highlands at Riverwalk	



Sheboygan Office  
P.O. Box 328  
Sheboygan, WI 53082-0328

April 24, 2013

Mayor Paul R. Soglin  
City of Madison Mayor's Office  
City-County Building, Room 403  
210 Martin Luther King Jr. Blvd.  
Madison, WI 53703

Mr. Paul Skidmore  
Aldersperson, District 9  
Madison Common Council  
City-County Building, Room 417  
210 Martin Luther King Jr. Blvd.  
Madison, WI 53703

Mr. Steven Cover, Director  
Department of Planning & Community & Economic Development  
City of Madison  
215 Martin Luther King Jr. Blvd., Room LL 100  
Madison, WI 53701

Mr. Timothy M. Parks, Planner  
Department of Planning & Community & Economic Development  
Planning Division  
City of Madison  
215 Martin Luther King Jr. Blvd., Room LL 100  
Madison, WI 53701

RE: Highland Communities Elderberry Neighborhood and United Financial Group, Inc.

Gentlemen:

I understand that Jon D. McMurtrie of United Financial Group, Inc. is applying for approvals of a mixed-use residential community to be located at 9601 Elderberry Road in the city of Madison. Jon McMurtrie asked us to communicate with you to address United Financial Group's ability to proceed to a spring 2014 construction start based on their financial capacity. Jon McMurtrie and United Financial Group (UFG) have banked with US Bank and our President Mike Nickels since 1983. Since then, UFG has built, currently owns, and operates over 3,400 living units, including 2,700 senior living units in eleven (11) Wisconsin communities.

For the past 25 years, United Financial Group has consistently been building senior communities at a production rate of 60-130 living units per year totaling over 2,700 units. For the past 10 years, development has occurred without project-based construction financing based on their financing strength, liquidity, and available credit from their existing 3,400+ housing units portfolio owned, without outside investors, by McMurtrie and his business partner of 30 years. US Bank currently has a \$7,500,000 three-year term credit facility available to UFG that could be used to finance the Madison project without the need of any construction financing.

In summary, US Bank has a long, positive financial relationship track record with Jon McMurtrie and UFG, and can attest to their ability, if approved by the Madison Plan Commission scheduled 5-6-13 and Common Council scheduled 5-21-13, to begin construction in 2014 of the Madison mixed-use residential community without the need to obtain construction financing based on their financial strength and existing credit.

Please do not hesitate to contact me at (920) 453-5546 if you have any questions. Thank you for your time.

Sincerely,

A handwritten signature in black ink, appearing to read 'Scott Gruenke', written in a cursive style.

Scott Gruenke  
Relationship Manager - Commercial Lending

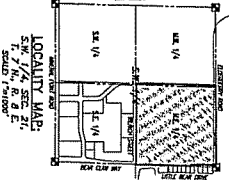
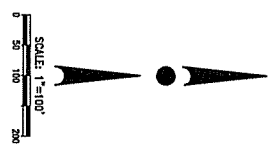
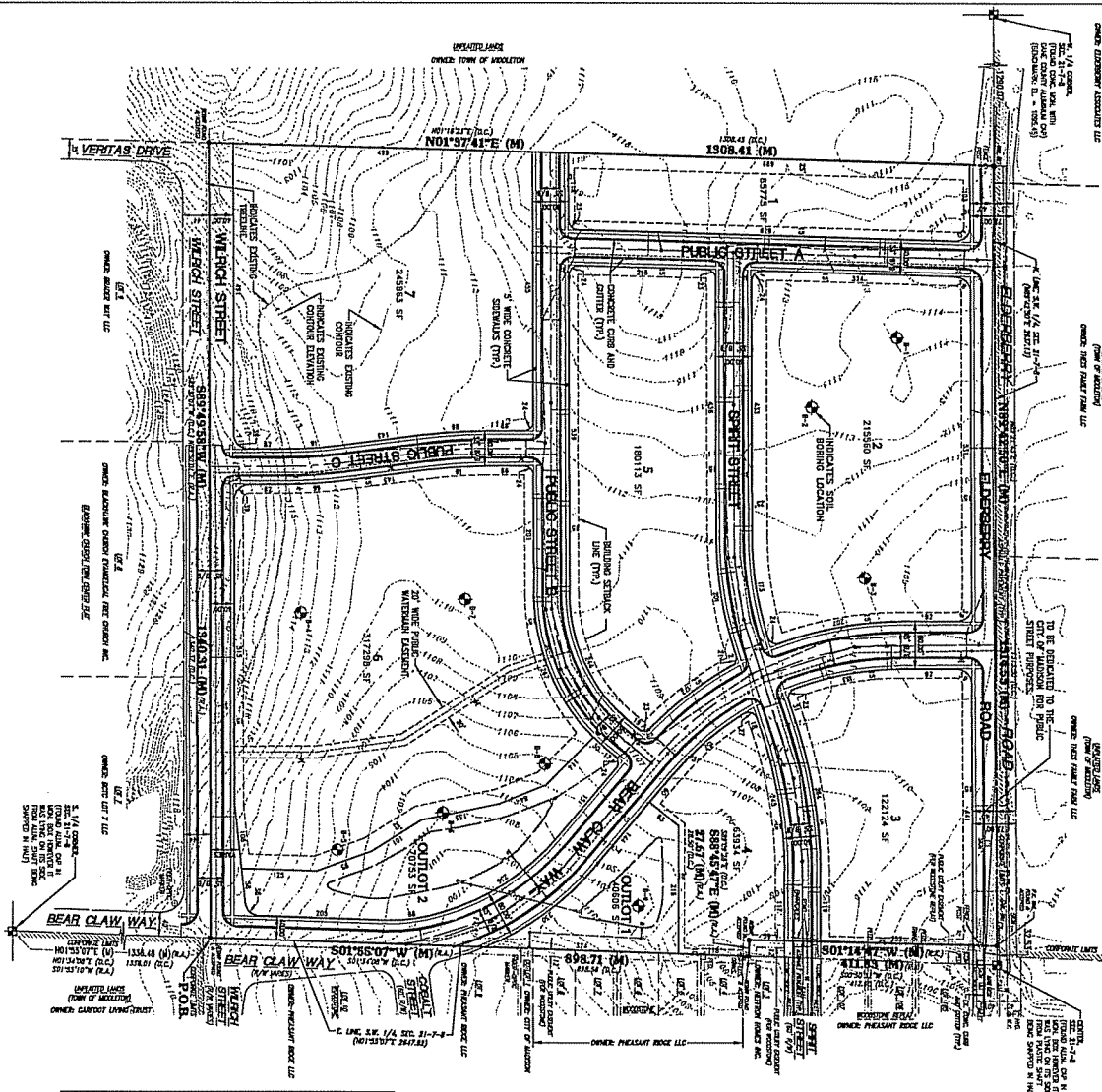
**LOT INFORMATION:**  
 Lot Number - 2  
 Lot Area - 12.26 ac  
 Lot Dimension - 311'

**DEVELOPER:**  
 UNITED FINANCIAL GROUP, INC.  
 880 W. RIDGEMOUNT DRIVE  
 APPLETON, WI 54911  
 PHONE (920) 868-4100  
 FAX (920) 731-1888

**ENGINEER / SURVEYOR:**  
 TRIO ENGINEERING, LLC  
 1000 W. WISCONSIN STREET  
 SUITE 200  
 APPLETON, WI 54911  
 PHONE (920) 730-1400  
 FAX (920) 730-1401

# PRELIMINARY PLAT OF PROPOSED HIGHLANDS COMMUNITY

BEING A SUBDIVISION OF A PART OF THE NORTHWEST 1/4 AND NORTHEAST 1/4 OF THE SOUTHWEST 1/4 OF SECTION 21, TOWN 7 NORTH, RANGE 8 EAST, IN THE CITY OF MADISON, DANE COUNTY, WISCONSIN



PROPOSED ZONING		
TRADITIONAL RESIDENTIAL - URBAN DISTRICTS - TRU DISTRICT ZONING REQUIREMENTS		
Lot Area (Ac. Ft.)	Minimum Lot Area (Ac. Ft.)	Minimum Lot Area (Ac. Ft.)
150,000 - 200,000	150,000	200,000
200,000 - 300,000	200,000	300,000
300,000 - 400,000	300,000	400,000
400,000 - 500,000	400,000	500,000
500,000 - 600,000	500,000	600,000
600,000 - 700,000	600,000	700,000
700,000 - 800,000	700,000	800,000
800,000 - 900,000	800,000	900,000
900,000 - 1,000,000	900,000	1,000,000
1,000,000 - 1,100,000	1,000,000	1,100,000
1,100,000 - 1,200,000	1,100,000	1,200,000
1,200,000 - 1,300,000	1,200,000	1,300,000
1,300,000 - 1,400,000	1,300,000	1,400,000
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1,800,000 - 1,900,000	1,800,000	1,900,000
1,900,000 - 2,000,000	1,900,000	2,000,000
2,000,000 - 2,100,000	2,000,000	2,100,000
2,100,000 - 2,200,000	2,100,000	2,200,000
2,200,000 - 2,300,000	2,200,000	2,300,000
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9,700,000 - 9,800,000	9,700,000	9,800,000
9,800,000 - 9,900,000	9,800,000	9,900,000
9,900,000 - 10,000,000	9,900,000	10,000,000

LEGEND	
(A)	"RECORDED" AS-BUILT BEARINGS AND DISTANCES
(B)	"RECORDED" BEARINGS AND DISTANCES
(C)	"RECORDED" BEARINGS AND DISTANCES
(D)	"RECORDED" BEARINGS AND DISTANCES
(E)	"RECORDED" BEARINGS AND DISTANCES
(F)	"RECORDED" BEARINGS AND DISTANCES
(G)	"RECORDED" BEARINGS AND DISTANCES
(H)	"RECORDED" BEARINGS AND DISTANCES
(I)	"RECORDED" BEARINGS AND DISTANCES
(J)	"RECORDED" BEARINGS AND DISTANCES
(K)	"RECORDED" BEARINGS AND DISTANCES
(L)	"RECORDED" BEARINGS AND DISTANCES
(M)	"RECORDED" BEARINGS AND DISTANCES
(N)	"RECORDED" BEARINGS AND DISTANCES
(O)	"RECORDED" BEARINGS AND DISTANCES
(P)	"RECORDED" BEARINGS AND DISTANCES
(Q)	"RECORDED" BEARINGS AND DISTANCES
(R)	"RECORDED" BEARINGS AND DISTANCES
(S)	"RECORDED" BEARINGS AND DISTANCES
(T)	"RECORDED" BEARINGS AND DISTANCES
(U)	"RECORDED" BEARINGS AND DISTANCES
(V)	"RECORDED" BEARINGS AND DISTANCES
(W)	"RECORDED" BEARINGS AND DISTANCES
(X)	"RECORDED" BEARINGS AND DISTANCES
(Y)	"RECORDED" BEARINGS AND DISTANCES
(Z)	"RECORDED" BEARINGS AND DISTANCES



Surveyor of the City of Madison  
 State of Wisconsin  
 2013

**DEVELOPMENT SUMMARY:**  
 1. Subdivision contains approximately 40.0 acres.  
 2. Subdivision contains 7 lots and 3 blocks.  
 3. All lots to be served by Sanitary Sewer and Wastewater.  
 4. Public Road to be served by Sanitary Sewer and Wastewater.  
 5. All lots to be served by Sanitary Sewer and Wastewater.  
 6. Public Road to be served by Sanitary Sewer and Wastewater.  
 7. The Subdivision is currently Zoned "R" (Residential Single-Family).  
 8. Lot 1 proposed one Single-Family Residence.  
 9. Lot 2 proposed one Single-Family Residence.  
 10. Lots 3 and 4 proposed one Condominium.  
 11. Lot 5 proposed one Single-Family Residence.  
 12. Lot 6 proposed one Single-Family Residence.  
 13. Lot 7 to be retained by the future development and shall retain the current "R" Zoning.  
 14. Lots 1 and 2 proposed one Single-Family Residence.

**TREE PRESERVATION NOTE:**  
 When ever possible, Existing Specimen Trees will be saved within the construction area of the project.

**HORIZONTAL DATUM PLANE:**  
 All bearings are referenced to the North American Vertical Datum, 1988 (NAVD83). The datum is established by the Wisconsin State Plane, NAD83 (1983), in which the East line of the SW 1/4 of Section 21, Town 7 North, Range 8 East, bears North 07°30'00" East.

**VERTICAL DATUM PLANE:**  
 All elevations are referenced to the North American Vertical Datum, 1988 (NAVD83). The datum is established by the Wisconsin State Plane, NAD83 (1983), in which the East line of the SW 1/4 of Section 21, Town 7 North, Range 8 East, bears North 07°30'00" East.

**AGENCIES HAVING THE AUTHORITY TO OBJECT:**  
 - State of Wisconsin, Department of Transportation  
 - Dane County Zoning and Land Regulation Committee

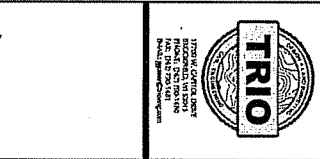
**APPROVING AUTHORITY:**  
 - City of Madison

**SURVEYOR'S CERTIFICATE:**  
 I, the undersigned, being a duly licensed Surveyor of the State of Wisconsin, do hereby certify that the foregoing is a true and correct copy of the original plat as the same was filed in my office, and that I am a duly licensed Surveyor of the State of Wisconsin.

Date: 2-6-13

DATE	DESCRIPTION
MARCH 6, 2013	JOB NUMBER: 12-041-31-01
	DESCRIPTION: PRELIMINARY PLAT
	SHEET 1 OF 1

**PROJECT:**  
**HIGHLANDS COMMUNITY**  
 ELDERBERRY NEIGHBORHOOD  
 CITY OF MADISON, WI  
 BY: United Financial Group, Inc.  
 880 W. Ridgeway Drive  
 Appleton, WI 54911



13-14