



NC DEPARTMENT OF HEALTH AND HUMAN SERVICES

ROY COOPER • Governor
KODY H. KINSLEY • Secretary
MARK PAYNE • Director, Division of Health Service Regulation

VIA EMAIL ONLY

May 18, 2023

Syed Javed
hello@heritagecarehome.com

Exempt from Review – Acquisition of Facility

Record #: 4200
Date of Request: May 9, 2023
Facility Name: Heritage Care Home of Taylorsville
Type of Facility: Adult Care Home
FID #: 092008
Acquisition by: Allied Investments, LLC
Business #: 3714
County: Alexander

Dear Mr. Javed:

The Healthcare Planning and Certificate of Need Section, Division of Health Service Regulation (Agency) determined that the project described above is exempt from certificate of need (CON) review in accordance with G.S. 131E-184(a)(8). Therefore, the above referenced business may proceed to acquire the health service facility identified above without first obtaining a CON. The new operator will be Heritage Care Home of Taylorsville, LLC. The Agency’s determination is limited to the question of whether the above referenced business would have to obtain a CON if the current owners of the health service facility do in fact sell it to the business listed above. Note that pursuant to G.S. 131E-181(b): “A recipient of a certificate of need, or any person who may subsequently acquire, in any manner whatsoever permitted by law, the service for which that certificate of need was issued, is required to materially comply with the representations made in its application for that certificate of need.”

If the business listed above does acquire the facility, you should contact the Agency’s Adult Care Licensure Section to obtain instructions for changing ownership of the existing facility.

It should be noted that this Agency's position is based solely on the facts represented by you and that any change in facts as represented would require further consideration by this Agency and a separate determination regarding whether a certificate of need would be required. If you have any questions concerning this matter, please feel free to contact this office.

Sincerely,

Ena Lightbourne
Project Analyst

Micheala Mitchell
Micheala Mitchell
Chief

cc: Adult Care Licensure Section, DHSR

NC DEPARTMENT OF HEALTH AND HUMAN SERVICES • DIVISION OF HEALTH SERVICE REGULATION
HEALTHCARE PLANNING AND CERTIFICATE OF NEED SECTION

LOCATION: 809 Ruggles Drive, Edgerton Building, Raleigh, NC 27603
MAILING ADDRESS: 809 Ruggles Drive, 2704 Mail Service Center, Raleigh, NC 27699-2704
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Via email

Ms. Tiffany Stancil  
Administrative Specialist I  
NC Division of Health Service Regulation Healthcare  
Planning and Certificate of Need Section  
809 Ruggles Drive, Raleigh, NC 27603  
[tiffany.stancil@dhhs.nc.gov](mailto:tiffany.stancil@dhhs.nc.gov)

Ms. Ena Lightbourne  
Project Analyst  
NC Division of Health Service Regulation Healthcare  
Planning and Certificate of Need Section  
809 Ruggles Drive, Raleigh, NC 27603  
[ena.lightbourne@dhhs.nc.gov](mailto:ena.lightbourne@dhhs.nc.gov)

**Re: Heritage Care Home of Taylorsville, LLC (“Buyer Operating Entity”)  
Allied Investments, LLC (“Buyer Real Estate Entity”)  
A New Outlook Properties, Inc. (“Seller Real Estate Entity”)  
A New Outlook of Taylorsville Inc. (“Seller Operating Entity”)  
668 Wood Rd, Taylorsville, NC 28681  
License Number: HAL-002-007**

Dear Ms. Stancil and Ms. Lightbourne: I am the owner of **Heritage Care Home of Taylorsville, LLC**, and **Allied Investments, LLC**, and am looking into licensing and certificate of need matters.

- **Allied Investments, LLC** proposes to acquire **A New Outlook Properties, Inc.** (Real Estate Property Owner: A New Outlook of Taylorsville) property constituting the existing health service facility licensed as an adult care home known as **A New Outlook of Taylorsville**.
- **Heritage Care Home of Taylorsville** plans to acquire the operations of the facility from **A New Outlook of Taylorsville, Inc.** (Licensee; Address: 668 Wood Rd., Taylorsville, NC 28681 (Alexander County); License Number: **HAL-002-007**).



After the acquisition, **Heritage Care Home of Taylorsville** will operate the adult care home pursuant to a lease with Allied Investments LLC. After **Heritage Care Home of Taylorsville** receives its license to operate the facility, the adult care home will be known as **Heritage Care Home of Taylorsville**.

Pursuant to G.S. § 13 ID- 184(a)(8), I understand that this transaction is exempt from review, and, as a result, we request that you confirm that understanding by providing us with a "no review" letter. As always, thank you for your assistance.

As always, thank you for your assistance.

Name: \_\_\_\_\_

Signature:  \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**From:** [Lightbourne, Ena](#)  
**To:** [Stancil, Tiffany C](#)  
**Subject:** FW: [External] Re: Certificate of Need  
**Date:** Tuesday, May 9, 2023 4:51:58 PM  
**Attachments:** [CON Letter A New Outlook Of Taylorsville.pdf](#)

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Tiffany can you log this in. Thanks.

**Ena Lightbourne**

Certificate of Need, Project Analyst

[Division of Health Service Regulation](#), Healthcare Planning and Certificate of Need Section *(Currently, I am in the office on Thursdays and Fridays. For the rest of the week, I can be reached by email.)*

[NC Department of Health and Human Services](#)

Office: 919-855-4610

[Ena.lightbourne@dhhs.nc.gov](mailto:Ena.lightbourne@dhhs.nc.gov)

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**From:** Heritage Care Home <[hello@heritagecarehome.com](mailto:hello@heritagecarehome.com)>

**Sent:** Tuesday, May 9, 2023 4:48 PM

**To:** Lightbourne, Ena <[ena.lightbourne@dhhs.nc.gov](mailto:ena.lightbourne@dhhs.nc.gov)>

**Subject:** [External] Re: Certificate of Need

**CAUTION:** External email. Do not click links or open attachments unless verified. Report suspicious emails with the Report Message button located on your Outlook menu bar on the Home tab.

Hello Ena,

Please find the attached document

On Tue, May 9, 2023 at 4:08 PM Lightbourne, Ena <[ena.lightbourne@dhhs.nc.gov](mailto:ena.lightbourne@dhhs.nc.gov)> wrote:

Hi Mr. Syed. How can I help you. Thanks,

**Ena Lightbourne**

Certificate of Need, Project Analyst

[Division of Health Service Regulation](#), Healthcare Planning and Certificate of Need Section

*(Currently, I am in the office on Thursdays and Fridays. For the rest of the week, I can be reached by email.)*

[NC Department of Health and Human Services](#)

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