

KENDAL[®]
at Oberlin
Together, transforming the experience of aging.®

How to Become a Kendal at Oberlin Priority Member

Plan Well to Live Well

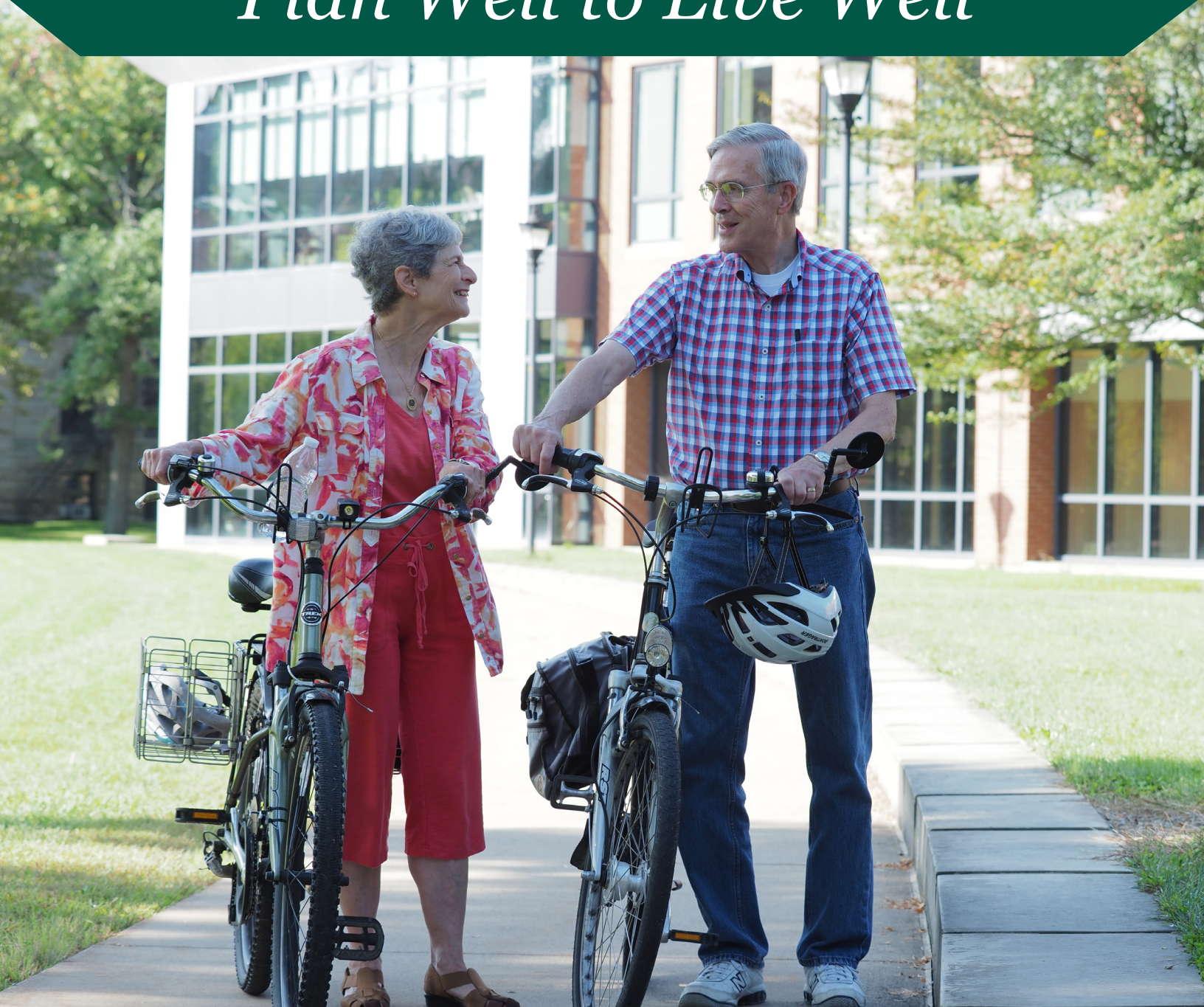


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What is a Priority Member at Kendal at Oberlin?

Becoming a Priority Member is the first step in the process to join the Kendal at Oberlin community. Members are guided through the process based on their approximate planned date for moving and the apartment or cottage they desire. As a Priority Member, you also gain community benefits. These benefits include access to our Priority Portal, invitations to special events, fitness center membership discounts, access to the dining and meeting rooms, annual community updates and more.



Priority Member Benefits

Access Our Priority Portal

Only Priority Members using a personal log-in can access the portal. Content includes: a digital, interactive room planner using Kendal’s actual floor plans, virtual classes from Kendal at Oberlin’s Lifelong Learning Committee, recorded lectures, performances and other programs presented at Kendal, access to forms for easy application and submission, current fee schedules and more helpful information about joining the community.

Enjoy the Kendalight

Stay up to date on the current happenings at Kendal at Oberlin. Receive the monthly resident newsletter, [The Kendalight](#), by mail.

“I remember getting The Kendalight and thinking, if I was there, I could do this or that activity.” - Suzanne McDougal, who moved to Kendal from Alexandria, Virginia, in 2017 and now volunteers as The Kendalight® associate editor

Get an Annual Financial Update

We will provide you with updated community financial information annually, including fee updates and disclosure statements.

“Priority Membership began several years before Kendal opened in 1993 and continues to be a good planning tool for prospective residents. It’s a wonderful way to get to know Kendal.”

- Terry Kovach, Director of Sales and Marketing

Stay Healthy & Meet New Friends

At Kendal at Oberlin, we take health and wellness very seriously. That's why we encourage local Priority Members to take advantage of our fitness center (including the pool and exercise areas!) before moving in. As a Priority Member, you get 50% off the regular monthly membership fee. This is also a great way to start meeting residents and making friends within the community.

Watch Now: Get an inside look at the Kendal at Oberlin Wellness Center and programs.



Dine With Us

If you haven't had the pleasure of dining at Kendal at Oberlin, here's your chance. As a Priority Member, you have access to our reasonably-priced restaurants in the community.

Stay With Us

Will you be traveling to Oberlin? Priority Members can rent one of our guest rooms if they are available. Would you like to stay a couple of days with us and get the full Kendal at Oberlin experience? [Schedule a tour](#) and ask us about our Try It, You'll Like It program.



Book Our Venue for a Private Party

If you need somewhere to host a small party or meeting, we can help you out. When available, you have access to Kendal at Oberlin's meeting rooms and dining spaces. Let us handle the cooking! We offer catering for Priority Members at resident prices.

Attend the Annual Priority Member Gathering

Although you can contact us with any questions you may have at any time, you will get invited to our annual Priority Member Luncheon with staff and residents. The luncheon includes a program, either entertaining or informational. After the program, we are happy to provide tours to show our latest updates within the community.

The COVID-19 pandemic introduced gatherings via Zoom. We found that enabled members both near and far to participate. We plan to offer both options going forward.

Ready to Apply? Here's Your Checklist

If you're ready to become a Priority Member, here's what you need to do:

- Submit a Priority Member application. Questions asked will include:
 - What is the approximate year you might want to move to Kendal?
 - What type and size of residence(s) interest you?
- Pay the \$1,000 priority deposit. This deposit is refundable at any time or can be used toward the Entry Fee if you decide to move to Kendal.
- Pay the processing fee - \$200 per individual, \$300 per couple.

Keep in mind, becoming a Priority Member is the first step to joining the Kendal at Oberlin community. There are a few more steps to follow once you near the date you are ready to move.

The Ready List Completes the Application Process

The next step will include applying for the Ready List. This process includes completion of three forms: Personal Health History (including authorization to obtain medical records), Financial Statement and Personal Information.

Once the forms are completed, an on-site Admissions Interview is scheduled so you can ask questions of staff and learn about Kendal in greater detail.

The Kendal Admissions Committee then reviews your application to ensure all requirements are met. Once approved, your names are placed on the Ready List and you are on the list to be contacted when your desired housing becomes available.

Frequently Asked Questions

Q: What's the difference between a Priority Member and a Ready List Member?

A: Becoming a Priority Member is your first step in the process of becoming a member. As a member, you will be guided based on your projected date of entry and the [apartment or cottage floorplan](#) desired. Members get annual updates, invitations to special events, fitness center membership discounts and access to the dining and meeting rooms.

The Ready List is the next step if you plan to move to Kendal at Oberlin in the nearer future. At this step, you will complete the Personal Health History form, your Financial Statement and Personal Information form. Once those forms have been submitted, you will then participate in an Admission Interview to review in detail Kendal at Oberlin's services and how the community will benefit you. The Kendal at Oberlin Admissions Committee will review your application, and once approved, your name(s) are placed on the Ready List. You will then be on the list to receive calls when we come to your name for your desired accommodation. The marketing staff will start at the top of the list when a space becomes available, and work their way down until someone says "yes" to the offer.

Q: Why become a Kendal Priority Member?

A: Becoming a Priority Member is easy, obligation-free and is an introduction to community amenities and events. It's a great way to meet residents, get to know the community better and plan ahead for your future. It also allows you to note your accommodation of choice for when you are ready to move. Kendal homes range from studio apartments to 2-bedroom plus den cottages.

Q: What are the benefits of being a Priority Member?

- A:**
- Access to the [Priority Portal](#), an online home for a host of benefits just for members.
 - Subscription to the monthly resident newsletter, The Kendalight and quarterly Reed newsletters.
 - Annual financial updates, such as fee updates and disclosure statements.
 - 50% off monthly membership in the Fitness Center, which includes exercise areas and a pool.
 - Access to all Kendal dining rooms, which serve tasty and affordable meals.
 - Access to guest room rental.
 - An invitation to the annual Priority Member luncheon.

Q: How much time do I have to sell my house when you offer me a cottage or apartment?

A: Currently, once we offer you a cottage or apartment and you agree that it's the place for you, you will have about two weeks before the signed contract and the initial 10% deposit are due back to us.

Because the real estate market is still soft in many areas, we've extended the maximum time from the contract signing to occupancy date from 90 to 150 days before the Entry Fee is due in full and the monthly fee begins. This is usually the time when people are actively marketing their homes and preparing to move to Kendal. If you happen to move in sooner than the occupancy date in the contract, the Entry Fee is due and the monthly fee begins at the time you move into your cottage or apartment.

Q: How do I know for certain I can afford Kendal at Oberlin?

A: "Our financial requirement for residency asks that people have enough income and assets to cover the cost of living at Kendal through their actuarial life expectancy," Kendal's sales and marketing director, Terry Kovach, says. "Unfortunately, there is no easy formula that tells us how much that is. There are many variables that have to be considered: size of accommodation, single or double occupancy, long-term care insurance (if applicable), and more."

To help you work through this, Kendal at Oberlin offers the initial option of our [MoneyGauge financial calculator](#). But the calculator doesn't cover all of the details. For that detailed picture, we can offer a confidential Preliminary Financial Analysis. We ask you to tell us what size accommodation you are considering, when you might move and some information about your income and assets. From there, we can calculate a year-by-year projection of financial status if you were living at Kendal. The projection includes conservative estimates of asset growth, as well as inflationary factors on expenses.

Of course, this is just one possible scenario and a conservative one as well. It is meant solely as a preliminary estimate of affordability and is not a guarantee of what your expenses at Kendal will be.

Quick Tip: Get our [Cost Comparison worksheet](#) to help guide you through comparing your monthly costs of living to the resident and care agreement plan that best suits your needs.

Cost Comparison Worksheet

HOW DOES KENDAL AT OBERLIN COMPARE TO MY CURRENT LIVING SITUATION?

Kendal at Oberlin offers options in residence and care agreements to suit your needs. This worksheet will help you compare the monthly costs of your current residence with the costs of living at Kendal at Oberlin.

CATEGORIES OF COSTS	REGULAR HOUSING	RESIDENT HOUSING	PLATINUM AGREEMENT	GOLD AGREEMENT
RESIDENT COSTS				
Living in my current residence	Regular monthly fee at Kendal at Oberlin	NA	INCLUDED	INCLUDED
Utilities	Electricity & gas	INCLUDED	INCLUDED	INCLUDED
	Water & sewer	INCLUDED	INCLUDED	INCLUDED
	Phone with separate and VOIP business service	INCLUDED	INCLUDED	INCLUDED
Home care & general maintenance	Tel./cable	INCLUDED	INCLUDED	INCLUDED
	Major repairs & replacement	INCLUDED	INCLUDED	INCLUDED
	Tank & stove removal	INCLUDED	INCLUDED	INCLUDED
HEALTH CARE & INSURANCE	Landscaping & lawn care	INCLUDED	INCLUDED	INCLUDED
	Housekeeping & house	INCLUDED	INCLUDED	INCLUDED
HOOD	Pool by Kendal at Oberlin	INCLUDED	INCLUDED	INCLUDED
	Private living area, three meals served daily	INCLUDED	INCL. / OPT.	INCL. / OPT.
MEDICAL CARE & INSURANCE	Car (gasoline, maintenance, repairs)	INCLUDED	INCLUDED	INCLUDED
	Car (gasoline, maintenance, repairs)	INCLUDED	INCLUDED	INCLUDED
TRANSPORTATION	Public transportation	INCLUDED	INCLUDED	INCLUDED
	Public transportation	INCLUDED	INCLUDED	INCLUDED
OTHER PERSONAL EXPENSES	INCLUDED	INCLUDED	INCLUDED	INCLUDED
	INCLUDED	INCLUDED	INCLUDED	INCLUDED

* Most services include basic needs only when a primary resident is in the facility. Care Costs: ** These costs may be greatly reduced when many services are provided as well as Kendal. **Kendal's Care Agreements represent estimates of charges & guidelines only with care structures only.

Q: When should I consider moving?

A: For many people, deciding where you want to move is often easier than deciding when. With the vibrant lifestyle that Kendal at Oberlin has to offer, it may make sense to move sooner rather than later. In fact, many residents have said after being here for a while, “I wish I had come to Kendal sooner.”

This is why becoming a Priority Member is a great planning tool. It provides you time to get to know the community while you decide when the time is right for you.

Q: What is the best way to learn more about becoming a Priority Member and about Kendal at Oberlin?

A: Schedule a tour and visit our community. During your tour, you will get an overview of contract options, information about resident life, lifelong learning opportunities and answers to any questions you may have.

[Schedule My Tour](#)



A Resident Success Story

Mary and Tom Van Nortwick took the first step to become Kendal at Oberlin residents when they became Priority Members. While planning and waiting times vary considerably among prospective residents, the Oberlin couple signed up 10 years prior to their move-in date.

“Being a Priority Member offers excellent benefits. And both of us love Oberlin and didn’t want to leave, and so early on, we thought Kendal was a very good idea,” Mary says.

The Van Nortwicks’ Road to Kendal

About the time they became Priority Members, Mary began caring for her mother, who had a stroke and was living in Canada. As her mother’s health declined, multiple moves were required. “That experience certainly confirmed for me how good the Kendal model is,” she says.

Kendal is a [life plan community](#), offering independent living, assisted living, and skilled nursing.



Then prior to moving in to Kendal at Oberlin, Mary faced her own health issue with a back surgery. She turned to the Kendal pool for deep water walking.

“The half-price membership was a cost saver,” says Mary, who continues to use the pool five times a week. “In addition to the health benefits, the pool has been a great way to nurture old friendships and make new friends,” she adds.

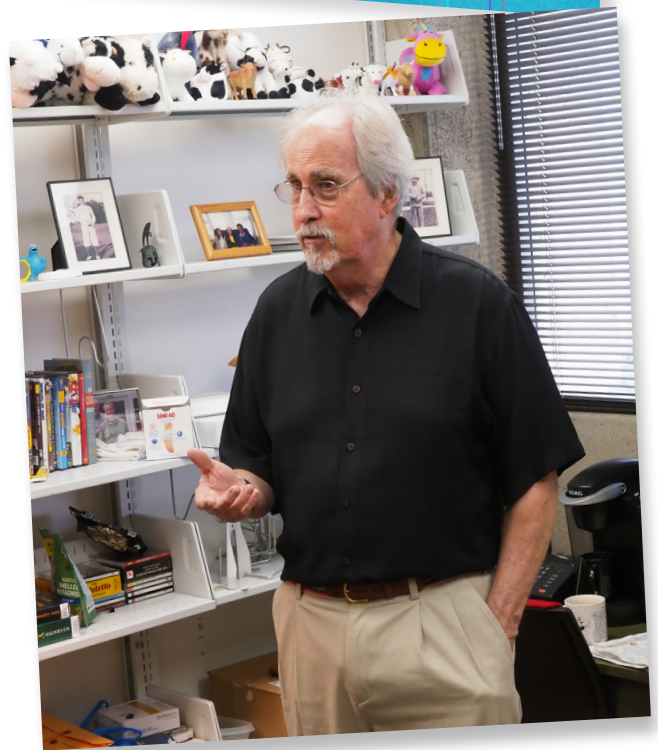
After recovering, the couple decided it was time to get serious about moving to Kendal, and they applied for the Ready List. They completed the required forms and had their on-site Admissions Interview to learn about Kendal in greater detail.

The Kendal Admissions Committee then reviewed and approved their application, placing their names on the Ready List to be notified when their desired housing was available.

The Van Nortwicks turned down a few available residences before finding their ideal cottage. “But the time was well spent,” Mary says. The couple has eaten many meals at the dining room with old and new friends.

Both retired professors – Tom an Oberlin College professor of classics and Mary a professor of English and director of Canadian Studies at the University of Akron -- attended many events and made social ties before they actually moved in. Tom even joined the weekly luncheon of retired Oberlin College professors.

“I’m not moving to a strange place at all,” Mary said when moving to her new home.



Moving Day Is Almost Here

Mary and Tom moved from a 10-room house to a 2-bedroom cottage and already had places lined up for donations – Habitat for Humanity ReStore and Kendal’s Resale Shop. They had been donating for years in preparation of their move.

For the Van Nortwicks, taking the first step a decade ago and then waiting until their ideal cottage was available, worked for them. Others spend much less time making the move.

Every resident’s road to Kendal varies in terms of duration, but becoming a Priority Member is the best way to start for everyone.

“You really look at Kendal in a different way once you become a Priority Member,” Mary says. “You start to think what it would feel like to live there, and your friends at Kendal start selling it to you.”

Schedule Your Tour

Visit Kendal at Oberlin and experience independent living in our vibrant campus community. Aside from touring our campus, we’ll also discuss the priority membership, contract options and finances, resident life, opportunities for lifelong learning in Oberlin and will answer any questions you have.

Schedule your tour through our [online form](#) or feel free to contact Elisabeth at 440-775-9062.

Schedule My Tour

My Tour Worksheet

Date: _____ Time: _____

Who I will be meeting with: _____

What to Bring:

Questions to Ask:

Notes:

KENDAL® at Oberlin

Together, transforming the experience of aging.®

600 Kendal Drive • Oberlin, Ohio 44074

1-800-548-9469 • fax: 440-775-9880

PRIORITY MEMBER INFORMATION

(A separate form is required for each person)

Date of Birth: _____

Full Name _____ City & State of Birth: _____

Address _____

City _____ State _____ Zip Code _____

Telephone (____) _____ E-mail Address _____

Alternate/Seasonal Address _____

City _____ State _____ Zip Code _____

Telephone (____) _____ Dates for Seasonal Address _____

Race: African American Asian Caucasian Hispanic Native American Pacific Islander

Marital Status: Married/Partnered Single Widowed Divorced

Education Completed: High School Undergraduate Graduate Post-Graduate Other _____

Colleges or Universities attended _____

Current Occupation _____ If Retired, Prior Occupation _____

Volunteer Activities _____

Hobbies & Interests _____

Religious Affiliation _____

Do you have a current or past relationship with Oberlin College? No Yes - Alumni year graduated _____

Please Explain: _____

Approximate year desired for residence at Kendal at Oberlin _____

Please indicate residence(s) you might consider for living at Kendal at Oberlin.

Renovated Cottages		Newer Cottages		Apartments	
Studio	<input type="checkbox"/>	Studio	<input type="checkbox"/>	Studio	<input type="checkbox"/>
One-bedroom	<input type="checkbox"/>	One-bedroom	<input type="checkbox"/>	One-bedroom	<input type="checkbox"/>
One-bedroom + den	<input type="checkbox"/>	One-bedroom + den	<input type="checkbox"/>	One-bedroom + den	<input type="checkbox"/>
One-bedroom + den deluxe	<input type="checkbox"/>	One-bedroom + den deluxe	<input type="checkbox"/>	One-bedroom + den deluxe	<input type="checkbox"/>
Two-bedroom	<input type="checkbox"/>	Two-bedroom	<input type="checkbox"/>	Two-bedroom	<input type="checkbox"/>
Two-bedroom + den	<input type="checkbox"/>	Two-bedroom + den	<input type="checkbox"/>	Two-bedroom + den	<input type="checkbox"/>
(Original construction)		(Original construction)		(Original construction)	

How did you learn about our community? _____

Are you on any other retirement community waiting list? If so, what community(s)? _____

Children's names; or, if none, please provide the name of your closest relative, friend or legal representative.

Name _____

Name _____

Address _____

Address _____

City _____ State _____ Zip _____

City _____ State _____ Zip _____

Phone _____ E-mail _____

Phone _____ E-mail _____

Relationship _____

Relationship _____

Name _____

Name _____

Address _____

Address _____

City _____ State _____ Zip _____

City _____ State _____ Zip _____

Phone _____ E-mail _____

Phone _____ E-mail _____

Relationship _____

Relationship _____

Name _____

Name _____

Address _____

Address _____

City _____ State _____ Zip _____

City _____ State _____ Zip _____

Phone _____ E-mail _____

Phone _____ E-mail _____

Relationship _____

Relationship _____

Please sign after reading the terms and conditions of the Priority List Agreement.

Applicant Signature

Kendal at Oberlin Signature

Date

Date

- Please enroll me in Kendal at Oberlin's Priority Press e-newsletter (email address required).
- Please connect me to Kendal at Oberlin's Priority Portal (email address required).
- Please contact me. I'd like to learn more about the above resources.

PRIORITY MEMBER AGREEMENT

Persons wishing to become a Priority Member for Kendal at Oberlin may do so by signing and delivering this Agreement to Kendal at Oberlin (hereinafter “Kendal” or “Community”), accompanied by a payment of \$1,200 (\$1,300 for co-occupants). The refundable Priority Fee portion of this payment is \$1,000.

Becoming a Priority Member is the first step in Kendal at Oberlin’s admissions process. The full application is not completed until the applicant(s) joins the Ready List. Admission to Kendal at Oberlin is not guaranteed until a Residence and Care Agreement has been signed for a specific accommodation.

1. An applicant’s Priority Fee of \$1,000 will be credited in full against the Kendal at Oberlin Entry Fee. The Priority Fee will be repaid in full within sixty days if applicant is not admitted to the Community or upon receipt by Kendal of a written request for repayment by an applicant who has not given notice of acceptance of an apartment. Kendal will not pay interest on Priority Fees, either when repaid or when credited against the Entry Fee.
2. The Registration Fee (\$200 for single person, \$300 for co-occupants) represents a recovery by Kendal as a part of its administrative costs and is nonrefundable.
3. The decision to admit or not to admit an applicant is made by Kendal and is the exercise of its sole discretion. The applicant agrees to accept such decisions as binding and final in all respects.
4. The Schedule of Fees for Kendal at Oberlin may be changed at any time. Written notices of such changes shall be mailed to everyone on the Priority List.
5. The Statement of Admission Procedures may be changed at any time. Written notice shall be mailed to everyone on the Priority List not less than sixty days prior to the effective date of such changes.
6. Should an applicant die before coming to the Community, Kendal will repay the Priority Fee in full to the applicant’s estate upon written request received within one year of the applicant’s death. Repayment will be made within sixty days of the receipt of the request. If no personal representative is appointed, Kendal shall select from among the applicant’s spouse, next of kin or other such responsible persons, to whom repayment shall be made. Upon making such selection and repayment, Kendal shall be fully discharged from all further liability in respect of such payment. Kendal shall not be charged with knowledge of an applicant’s death until notified in writing.

If you wish to designate this deposit as a donation to Kendal at Oberlin in the event of your death, please sign here: _____ Date: _____

Kendal at Oberlin is a 501(c) (3) nonprofit organization. Donations are tax-deductible.

7. Except as provided in paragraph 6 in respect of repayments, an applicant’s rights under this agreement are personal to him/her, may not be assigned, and shall not pass to his/her heirs or personal representatives. If application is made by co-occupants, both are deemed to be included in the word “applicant” as used in this agreement, and payment of a single Priority Fee and \$300 Registration Fee shall cover both.

8. It is understood that Kendal is free to expend Priority Fees for any proper corporate purpose, including costs of construction, subject to its responsibility to credit or repay the Fee in accordance with the terms of this agreement.
9. Any notice to an applicant shall be sufficiently given if mailed to the address given on this form or as applicant may later advise Kendal at Oberlin.
10. The applicant will receive a Disclosure Statement and a sample Residence and Care Agreement for Kendal at Oberlin. (These items will be mailed with acknowledgment of deposit.)
11. This Agreement shall supersede any Priority Member Information or Agreement previously signed by the applicant.