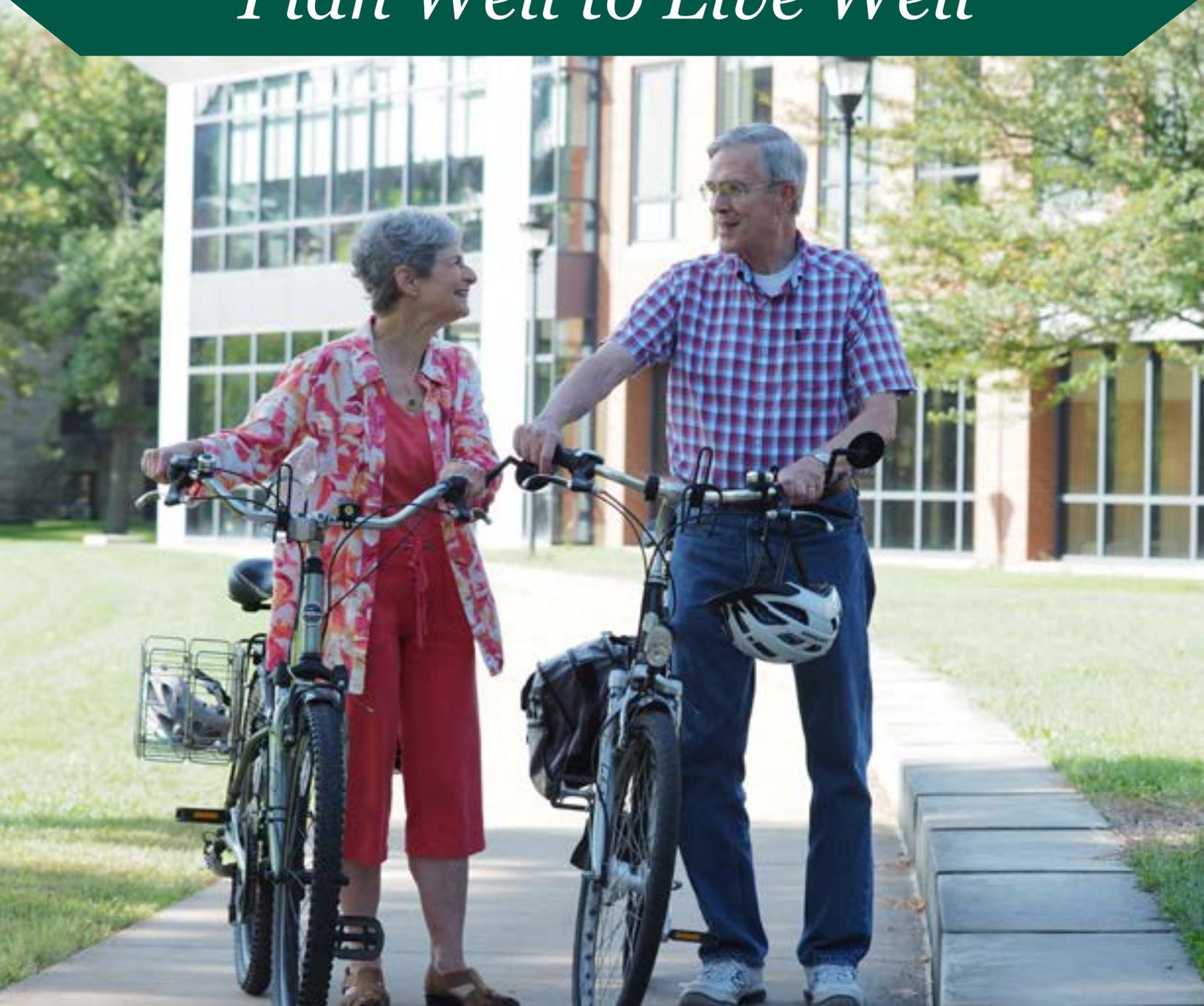


KENDAL®  
*at Oberlin*

# 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, 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 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. Local Priority Members can join the new *Kendal Friends* program, offering limited access to our Fitness Center, as well as wellness assessments, and more. This is also a great way to start meeting residents and making friends within the community.



## 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. Priority Members are welcome to enjoy our dining rooms Monday through Saturday during regular hours. We accept cash or check for payment (no tipping). Ask a member of the Sales & Marketing team for more information.



## 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 Gathering with staff and residents. The event includes a program, either entertaining or informational, and is typically offered as a hybrid meeting both in-person and via Zoom. After the program, we are happy to provide tours for in-person visitors to show our latest updates within the community.

## 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

After becoming a Priority Member the next steps are to Join the Ready List and complete an admissions interview.

## The Ready List Completes the Application Process

The next step will include applying for the Ready List. This process includes completion of three forms: Preliminary Health History, Financial Statement and Personal Information.

**Reach out to the Sales and Marketing office to  
learn more about joining the Ready List**

## 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, and more.

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 Preliminary Health History form, your Financial Statement and Personal Information form. Once those forms have been submitted and reviewed, you will be added to the Ready List pending the completion of an admissions interview closer to the time of contract. 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 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 the Reed newsletters.
- Annual financial updates, such as fee updates and disclosure statements.
- Local Priority Members can join the *Kendal Friends* program for a small annual fee, featuring limited access to the Fitness Center, which includes exercise areas and a pool.
- Limited access to Kendal dining rooms.
- Access to guest room rental if available.
- An invitation to the annual Priority Member Gathering.

**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.

The maximum time from the contract signing to occupancy date is 90 days when 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, age, 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.*

**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 discounted membership was a cost saver,” says Mary, who continues to use the pool often. “In addition to the health benefits, the pool has been a great way to nurture old friendships and make new friends,” she adds.

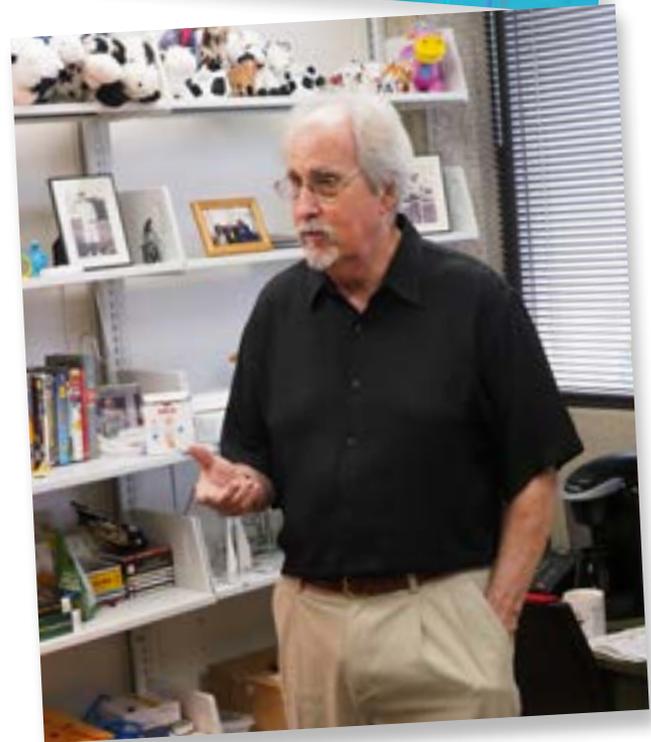
After recovering, the couple decided it was time to get serious about moving to Kendal, and they applied for the Ready List. They completed the required forms and had their on-site Admissions Interview to learn about Kendal in greater detail.

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 enjoyed 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 Kelly at 440-775-9810.*

**Call to Schedule My Tour**