

# Kendal at Lexington's Priority Waitlist

Kendal at Lexington's marketing staff manages a Priority Waitlist for prospective residents who are strongly considering making Kendal their home. A \$1250 deposit is required to be on the wait list (\$1000 is refundable at any time). The membership also provides some special benefits that help waitlist members stay engaged in the community.

## Why join:

- You are not ready to move, but want your name on a waitlist so your name 'rises up to the top' as time goes by.
- You might need to sell before you are able to move, so by securing a spot on the wait list, you are able to wait for your residence to sell while moving up on the waitlist.
- You are still narrowing your choices and want to be notified about openings at several different communities; what's available in your move-in timeframe will help you make your decision.
- Benefits include invitations to special events and Kendal activities and an ability to join the fitness center\*. (\*There is a fee to use the fitness center.)
- You will also receive the Resident Newsletter every month, which is full of information about the community and events taking place.

## HOW THE PRIORITY WAITLIST IS MANAGED:

- **Kendal at Lexington's list is an "Open-Ended" Waitlist:**  
Should you get offered an apartment or cottage, you are under no obligation to accept it. You keep your position on the list and can wait until the next opening. Because of the way we manage the list and the varied "readiness" of the members on the list, it is impossible for us to give a "wait time". We can tell you that the earlier you get on the list, the better. And the more flexible you are about your floor plan, the more likely you are to be able to move to the community soon.
- **There is no test to pass before joining the Waitlist:**  
That happens later, when you reserve a specific residence and apply to enter. KaLex does offer voluntary preliminary reviews for those who wish to provide and discuss medical and financial information before joining the priority waitlist list.
- **You do not have to sign up for a specific category of residence or floor plan:**  
You can be very flexible if you're open to various options. Just let the Marketing Department know your parameters.
- **Members are not contacted every time something is open (unless requested):**  
It's up to those on the list to let the Marketing Department know if they are ready to be contacted about availability. Marketing works to keep communication open, but at the frequency that you'd prefer.
- **There may be a second Waitlist for "New" cottages:**  
Currently, KaLex manages one waitlist for the entire community. There are preliminary plans to possibly build additional cottages. If this occurs, current waitlist members will receive priority status to join another refundable "new build" waitlist while maintaining their status on the current waitlist.

**KENDAL**<sup>®</sup>  
*at Lexington*

*Together, transforming the experience of aging.*

160 Kendal Drive  
Lexington, Va 24450

1-800-976-8303 • 540-463-1910  
email: [info@kalex.kendal.org](mailto:info@kalex.kendal.org)

**KALEX.Kendal.org**



more —>

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- **Becoming a wait list member does not provide a medical or financial acceptance guarantee:**

Medical and financial information will need to be shared at the time of reservation of a specific residence to determine ability to safely live in an independent residence and cover the cost of the fees over time.

- **Waitlist applications can be found on the website or by contacting the marketing office:**

Visit [kalex.kendal.org](http://kalex.kendal.org), call (866) 973-860 or email [info@kalex.kendal.org](mailto:info@kalex.kendal.org)

### **Statistics as of September 15, 2016:**

- **Occupancy in IL: 99.2%** (including reservations for open residences)
- **Number of households on Waitlist:** 152 (approx. 100 double households, and the rest single)
- **Over 60 % are from the local area, approx. 15% are from other areas in Virginia and approx. 25% are from places all over the country.**

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Persons wishing to maintain a position on the Kendal at Lexington Priority Waitlist may do so by signing and delivering this agreement to Kendal at Lexington (hereinafter “Kendal”), accompanied by a payment of \$1,250.

1. An applicant’s Priority Fee of \$1,000 will be credited in full against the Kendal at Lexington Entry Fee. The Priority Fee will be repaid in full within 60 days if applicant is not admitted to the Community or upon receipt by Kendal of a written request for repayment. Kendal will not pay interest on Priority Fees, either when repaid or when credited against the entry fee.
2. The Application Fee (\$250) represents a recovery by Kendal as a part of its administrative costs and is non-refundable.
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. Kendal at Lexington considers and admits applicants without regard to race, religion, sex, national origin, or sexual orientation.
4. The Schedule of Fees for Kendal at Lexington may be changed at any time. Written notices of such changes shall be mailed to everyone on the Priority Waitlist.
5. The Statement of Admission Procedures may be changed at any time. Written notice of such changes shall be mailed to everyone on the Priority Waitlist not less than sixty days prior to the effective date of such changes.
6. If application is made by two people intending to share one unit, both are deemed to be included in the word “applicant” as used in this agreement, and payment of a single Priority Fee and Application Fee shall cover both. Either person may terminate the Agreement. In such case, the second applicant may reapply within 30 days and maintain the original position on the Priority List.
7. If you die while your priority deposit is still being held by Kendal at Lexington, the deposit will be refunded in full to the duly appointed personal representative of your estate or, if none, to your spouse, or, if none, to those entitled to your estate under the Virginia law of interstate succession as in effect at the time of your death. Such refund shall be made no later than thirty days after receipt by Kendal of written request therefore and satisfactory proof of death. Payment shall constitute full and complete discharge of the community’s obligation to you and your estate.
8. Except as provided in paragraph 7 in respect of repayments, an applicant’s rights under this

agreement are personal to you and may not be assigned or transferred by you and shall not pass to your heirs or devisees or to a personal representative of your estate.

9. 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.
10. Any notice to an applicant shall be sufficiently given if mailed to the address provided on this form (or as an applicant may later inform Kendal).
11. This agreement shall supersede any priority list information or agreement previously signed by the applicant.

*Note: Two persons intending to occupy one residence may complete one Priority Agreement and pay one Priority Reservation Fee that will cover both persons.*

**Please Complete Sections Below:**

Name of First Occupant: \_\_\_\_\_

Marital Status \_\_\_\_\_ Sex \_\_\_\_\_ Date of Birth: Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Telephone ( ) \_\_\_\_\_

E-mail Address \_\_\_\_\_

Alternate Address:

Address \_\_\_\_\_ Effective Dates \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Telephone ( ) \_\_\_\_\_

Name of Second Occupant \_\_\_\_\_ Relationship to First \_\_\_\_\_

Marital Status \_\_\_\_\_ Sex \_\_\_\_\_ Date of Birth: Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

*Address of Second Occupant, if different from above:*

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Telephone ( ) \_\_\_\_\_

E-mail Address \_\_\_\_\_

**RESIDENTIAL PREFERENCE**

Type of Residence Preferred:  Cottage  Apartment

Size of Residence Preferred:  Studio or One Bedroom  One Bedroom/Den  Two Bedroom  
 Two Bedroom/Den

Estimated Year of Entry \_\_\_\_\_

What is your present living situation?  Own home  Rent  
 Other \_\_\_\_\_

**PERSONAL INFORMATION** (Optional- We'd like to get to know you better.)

**First Occupant:**

Education:  High School  Undergraduate  Graduate  Other \_\_\_\_\_

College or University \_\_\_\_\_ Majors/Areas of Study \_\_\_\_\_

Volunteer Activities \_\_\_\_\_

Current or Previous Occupation(s) \_\_\_\_\_

Civic/Service/Religious Affiliation \_\_\_\_\_

Special Interests/Talents \_\_\_\_\_

Long-term Care Insurance:  Yes  No

**Second Occupant:**

Education:  High School  Undergraduate  Graduate  Other \_\_\_\_\_

College or University \_\_\_\_\_ Majors/Areas of Study \_\_\_\_\_

Volunteer Activities \_\_\_\_\_

Current or Previous Occupation(s) \_\_\_\_\_

Civic/Service/Religious Affiliation \_\_\_\_\_

Special Interests/Talents \_\_\_\_\_

Long-term Care Insurance:  Yes  No

**PAYMENT**

A check for **\$1,250** (your Priority List Fee of \$1,000 plus the \$250 non-refundable application fee) should be made **payable to Kendal at Lexington**.

Please mail the signed Priority Reservation Agreement and check to:

Kendal at Lexington  
160 Kendal Drive, Lexington, Virginia 24450  
Att: Marketing Department

Feel free to contact the Marketing Department with any questions. We're happy to help!  
540-463-1910 | 800-976-8303 | info@kalex.kendal.org

\_\_\_\_\_  
**First Applicant's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Second Applicant's Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Kendal at Lexington Representative**

\_\_\_\_\_  
**Date**