



Lenbrook

New Resident Checklist

DAY 1: RESERVE YOUR RESIDENCE

Now that you've selected your residence, what do you do next?

- Reserve your residence with a fully refundable \$1,000 **reservation deposit and signing of a Reservation Agreement**. If you are an Advantage Club member, your \$1,000 membership fee will be rolled over and serve as the \$1,000 deposit. Settlement on your residence is on or before 90 days from the date of your Reservation Agreement.

DAY 5: SECURE YOUR RESIDENCE

- **Pay a 10% deposit on the Entrance Fee for your specific residence and sign the Residence and Services Agreement and any applicable addenda.**

1. **Meet with your Residency Counselor to make your 10% deposit**
2. **Meet Lenbrook's Move-In Manager Team, Katie Murphy and Kelly Almond**

Lenbrook's Move-In Management Team will assist with the scheduling and logistics of your move to ensure your apartment home is "move-in ready".

During this appointment, they will review the timeline, renovation options for your residence, and Lenbrook's VIP Moving Program which takes the stress out of moving.

To ensure quality and timeliness of any custom changes, all custom changes will be completed by one of Lenbrook's preferred vendors.

3. **Meet and Greet with the LIVE Team, Lenbrook's supportive services professionals**

This team will welcome you to all that Lenbrook has to offer and be a continued point of contact during your residency in the community.

DAY 5-30: Complete the Application Process

- Complete your **Application for Residency** within the next 14 days and return to Lenbrook.

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The following three steps should be completed on or before 30 days from the date of the initial deposit which is listed at the top of this page.

1. **THE LENBROOK APPLICATION** and copy of the first two pages of a recent tax return and back-up of liquid assets (if not already completed).

2. **MEDICAL EVALUATION**

a. Schedule an appointment with your **Primary Care Physician** to complete the Medical Exam Form, which Lenbrook will provide to either you or your physician. ***Please note that a TB TEST IS A REQUIREMENT ON THIS FORM.**

3. **BASELINE FUNCTIONAL ASSESMENT**

b. This is an assessment perform by a licensed physical therapist that provides Lenbrook with a baseline for incoming residents. Lenbrook offers this Assessment on-site free of charge. The assessment usually takes approximately 30 minutes.

If you live outside the Atlanta area, you may also schedule an appointment with a licensed Physical Therapist of your choice. In this instance, we will provide the assessment forms to the therapist directly.

Your completed Application for Residency will be reviewed by the Management Team; all Application materials and information are held in strict confidence. Upon final review, you will receive notification that all steps in the application process have been satisfactorily completed!

DAY 30: FINALIZE SELECTION FORM

- **FINALIZE AND APPROVE SELECTION FORM** -Any custom changes requested must be approved and signed as an Addendum to the Residence and Services Agreement. As a reminder, the standard timeline from initial reservation to settlement is 90 days. If changes or delays occur in construction after this time due to the resident making changes, the resident will adhere to the agreed upon settlement date as written on the addendum. If there are any delays by the Lenbrook Team, the timeline of the settlement will be adjusted accordingly.

DAY 60: FINALIZE DETAILS OF THE MOVE

- Have Furniture Layout Complete
- Finalize Settlement and Move date – Move Managers will work with Lenbrook’s Move-In Management Team to finalize your Settlement Date and Physical Move Date (may or may not be the same date), book the elevator, and reserve a guest suite if needed.
- Schedule Orientation
- Lenbrook will provide a Notice of Availability (NOA) Letter 30 days prior to the Settlement Date with all the necessary settlement information including Entrance Fee balance due, prorated monthly fees, and any applicable credits.

DAY 75: COMPLETE ORIENTATION PAPERWORK AND PREPARE FOR SETTLEMENT

- Review and complete Orientation Documents sent from Lenbrook
 - Identified items from the Orientation Booklet (this will be sent to you prior to your Settlement)
 - Emergency Contact Information
 - A copy of any Powers of Attorney and/or Living Wills
- Confirm Settlement Date and Orientation with the Move-In Management Team

DAY 90: SETTLEMENT APPOINTMENT –

- Settlement to occur within the timeline agreed upon at the initial reservation deposit, Physical occupancy can be scheduled any time on or after a Settlement has been completed.
- Receive the keys to your new Residence and a complete tour and Orientation to Lenbrook with a member of the LIVE Team.

BEGIN ENJOYING YOUR LIFE AT LENBROOK!

WE ARE SO GLAD YOU ARE HERE!

Congratulations and Welcome to Lenbrook!