



WILLOW  
VALLEY  
COMMUNITIES

# A Single Monthly Service Fee That Includes Many Services to Make Your Lifestyle Complete

The many services at Willow Valley Communities, all of which are included in your Monthly Service Fee, provide a maintenance-free lifestyle in a vibrant and amenity-rich environment. Because it replaces many of your current expenses, such as property taxes, utilities, and home maintenance, you'll find our monthly fees are affordable and provide many added benefits. In addition, because Willow Valley Communities is a Type A Lifecare community, your monthly fee typically qualifies for a significant medical expense tax deduction and protects you from unpredictable long-term care costs.

Here are just some of the many services provided for one predictable monthly fee:

- Lifecare: Short- or long-term supportive care in personal care, memory support, and skilled nursing without an increase to your Monthly Service Fee because of the need for enhanced care
- Real estate taxes/property insurance
- Utilities: Electricity, water, sewer, heat, air conditioning, trash
- Maintenance and weekly or annual housekeeping (housekeeping frequency based on residence style selected)
- Lawn care, snow removal, and landscape maintenance
- 24-hour Residential Nursing support for emergency response
- Scheduled and On-Demand transportation services within Willow Valley Communities
- Scheduled transportation to area shopping venues, doctor offices, and grocery stores
- Use of all amenities at the Cultural Center and The Clubhouse including fitness and aquatics centers, aerobics studio, art studios, bowling alley, sports center, tennis courts, indoor/outdoor pool (seasonally), golf simulator, and vintage arcade
- Scheduled fitness, aquatics, and wellness classes (some fees may apply)
- Educational classes, lecture series, and seminars (some fees may apply)
- 100+ clubs and groups
- Flexible dining credit program for use at any of Willow Valley Communities' 12 dining venues, including our full-service gourmet restaurant, Local Table



## SouthPointe at Lakes SouthPointe Village – Apartments

Entrance and Monthly Fees

Effective January 2, 2022

*Buildings M and N*

| Name               | Description           | Sq.Ft. | Capital (Zero) | Traditional (33%) | *Estate (90%) | 2022 MSF |
|--------------------|-----------------------|--------|----------------|-------------------|---------------|----------|
| Hatfield           | 2 BR, 2½ Bath         | 1,704  | \$395,600      | \$466,700         | \$688,800     | \$3,929  |
| Hatfield Variation | 2 BR, 2½ Bath         | 1,737  | \$395,600      | \$466,700         | \$688,800     | \$3,929  |
| Kingsbury          | 2 BR, 2½ Bath w/Study | 1,878  | \$438,600      | \$517,700         | \$763,800     | \$4,770  |
| Second Person Fee  |                       |        | \$26,000       | \$31,000          | \$45,000      | \$1,458  |

### Top Floor Premium

|                    |          |
|--------------------|----------|
| Hatfield           | \$8,000  |
| Hatfield Variation | \$8,000  |
| Kingsbury          | \$10,000 |

Monthly Service Fees (MSF) presented above apply to calendar year 2022 for SouthPointe Village apartment move-ins that occur at any time in 2022 for the balance of that year. Willow Valley Communities' Monthly Service Fees increase annually. 2023 Monthly Service Fees will be higher. The annual average increase over the last 10 years has been 3.5%.

Entrance Fees paid are reduced by 2% per month until the minimum refund amount is reached. All Monthly Service Fees (MSF) include a Dining Credit of \$405 per month per person. If you opt out of the Dining Credit Meal Plan, your MSF will be reduced by \$295 per month per person. Contact your Sales Counselor for details.

At Willow Valley Communities, your Monthly Service Fee includes Lifecare coverage, a contract that entitles you to short- or long-term personal care, skilled nursing care, or memory support, should you need it, without a change to your monthly fee because of the need for increased care. In addition to the peace of mind of Lifecare, your monthly fee at Willow Valley Communities also covers a long list of expenses that you may already be paying. Your residence, electricity, water, heating and cooling, trash removal, real estate taxes, and property insurance are all included in your monthly service fee.

**\*The Estate Plan (90% refund) entrance fee option is available to those 79 years of age or younger.**