



McLean is very pleased to offer the opportunity for placement on McLean's Vantage Member List for future new residences, in exchange for a fully refundable deposit in the amount of \$1,000 (the "Vantage Program Deposit").

This Vantage Program Agreement is between McLean Affiliates, Inc. ("McLean," or "we"), a not-for-profit life plan community located in Simsbury, Connecticut, and \_\_\_\_\_.

McLean offers a full continuum of residence options including independent living, assisted living, memory care, short-term rehabilitation, and long-term care. McLean is a non-stock corporation organized under Connecticut law and exempt from taxation under section 501(c)(3) of the Internal Revenue Code. McLean is a subsidiary of the McLean Fund, a trust created by the will of Senator George P. McLean. McLean is registered with the Connecticut Department of Social Services as a continuing care facility and consists of villas and apartments.

**As a member of the Vantage Program, you and McLean agree as follows:**

1. This Agreement confirms that you have paid the Vantage Program Deposit, in the amount of \$1,000.
2. The Vantage Member List is organized in chronological order based on the date and time that each Vantage Program Deposit is received. Your Vantage Member Number is \_\_\_\_\_. Your placement on the Vantage Member List entitles you to certain benefits if you reserve a residence as described in paragraph 4 of this Agreement. These benefits include:
  - Priority choice of residence location and floor plan in order of your Vantage Number
  - Lowest pre-construction pricing (5% discount off entrance fee)
  - 5% premium on entrance fee refund for select contract types
  - Monthly fee waived for two months
  - \$100 discount off second-person monthly fee for 24 months
  - \$2,500 toward selection of options and upgrades
  - \$2,500 credit toward moving expenses
  - Complimentary Boundless Wellness class passes
  - Exclusive access to special events at McLean, Hop Meadow Country Club, and McLean Game Refuge
3. McLean will deposit the Vantage Program Deposit in an escrow account. The Vantage Program Deposit is fully refundable. You may withdraw your name from the Vantage Member List at any time upon written notice to McLean, either by (a) regular mail or (b) electronic mail sent to: [Marketing@McLeanCare.org](mailto:Marketing@McLeanCare.org). Once McLean receives such notice, we will refund your Vantage Program Deposit, and this Agreement will automatically terminate.



4. When floor plans and pricing become available, you will be contacted in order of your Vantage Member Number to select and reserve a residence.

- At that time, you must pay an amount equal to ten percent (10%) of the Entrance Fee to reserve the Residence (“Reservation Deposit”). The Vantage Program Deposit will be credited toward the Reservation Deposit. McLean will deposit the Reservation Deposit in an escrow account as and to the extent required by Connecticut law. At this time we will also ask you to complete McLean’s application for residency, which includes both a health assessment and a financial disclosure.
- Once we notify you that your application is approved, you will sign a Reservation Agreement to complete your reservation. If we notify you that your application is not approved, we will refund the Reservation Deposit.

5. You understand and agree that this Agreement is non-binding and intended solely for your placement on the Vantage Member List. This Agreement does not guarantee acceptance into the Community and does not obligate you to continue with the reservation and application process.

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State ZIP

\_\_\_\_\_  
Home phone Cell phone

\_\_\_\_\_  
Email address

\_\_\_\_\_  
Signature Date

Please mail or deliver this completed form along with a check  
OR credit card information (right) to:

**McLean**  
**75 Great Pond Rd. Simsbury, CT 06070**  
**Attn: Marketing Department**

**Credit Card Information**

Name on card: \_\_\_\_\_

Card number: \_\_\_\_\_

Expiration date: \_\_\_\_\_

3- or 4-digit security code: \_\_\_\_\_

\*All deposits will be held in a federally insured bank (Bank of America). You may obtain a full refund of the Vantage Program Deposit at any time. If a refund is requested, you will forfeit your Vantage Number.

**Internal Use:**

Received by date: \_\_\_\_\_

Vantage Number assigned: \_\_\_\_\_

