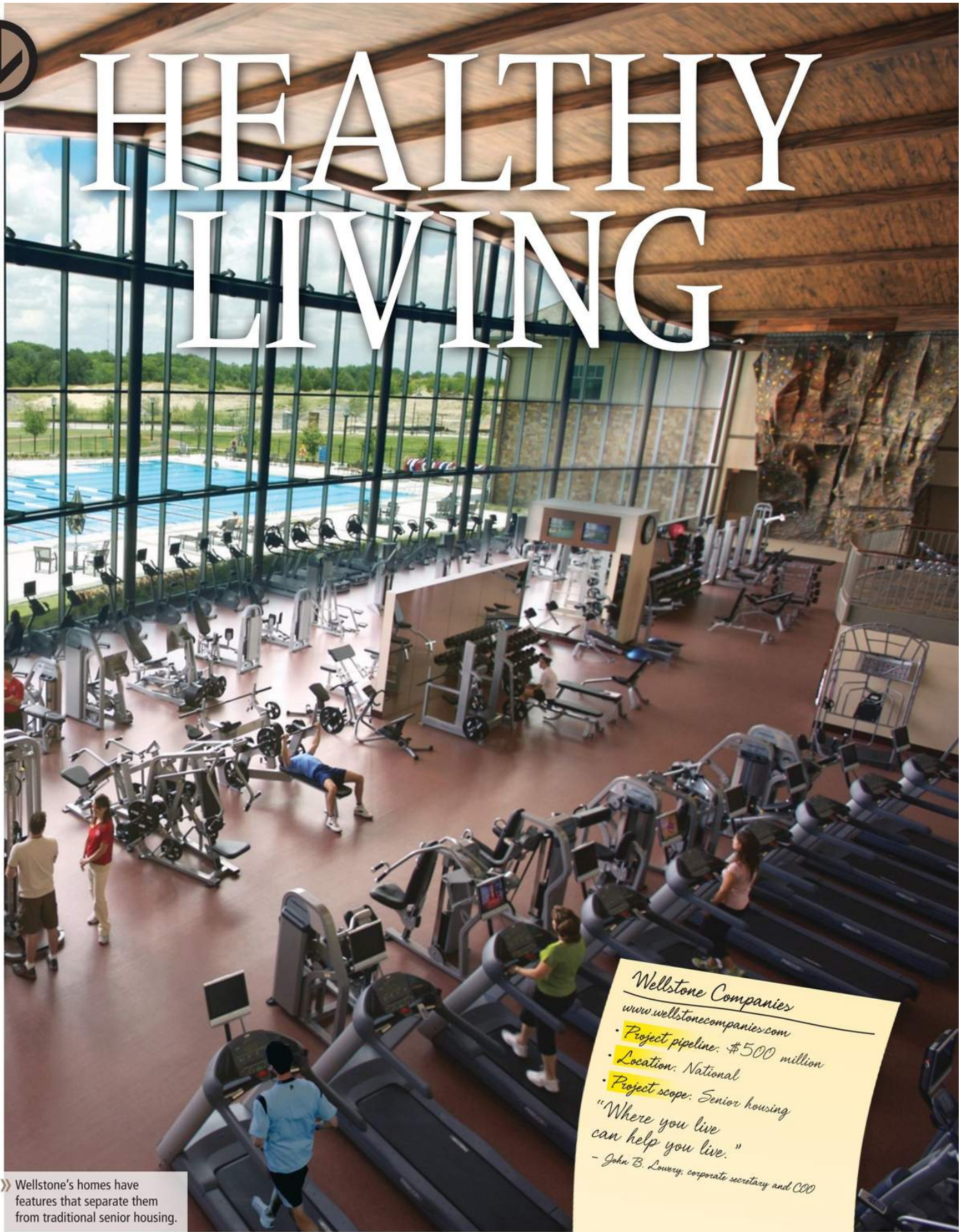




WELLSTONE COMPANIES

# HEALTHY LIVING



» Wellstone's homes have features that separate them from traditional senior housing.

*Wellstone Companies*  
[www.wellstonecompanies.com](http://www.wellstonecompanies.com)  
 • Project pipeline: \$500 million  
 • Location: National  
 • Project scope: Senior housing  
 "Where you live can help you live."  
 - John B. Lowery, corporate secretary and COO





Wellstone's projects will help residents to live longer and healthier. BY ALAN DORICH

When Wellstone Companies builds a senior housing development, it is far from what is usually considered a retirement community. "They're active communities for active adults who have an active lifestyle," Russell Criminger Jr. explains.

Criminger is the executive vice president of marketing and a shareholder in the company which is located in Fort Worth, Texas, and Oklahoma City, and has been in the senior housing industry since its start. Wellstone was founded in 1979.

Wellstone's first project was Plough Towers, an 11-story building with 200 units in Memphis. "Our focus, for the first 35 years, was on the aging-in-place senior citizen," Corporate Secretary and COO John B. Lowery recalls. Over the years, the company developed 62 properties with approximately 10,000 units.

Wellstone's focus has evolved in the last two years to reflect the improving health of its residents. "When we opened up our first community in Memphis in 1980, our average resident moving in was 68 years old," Lowery recalls. "Our average resident moving to the funeral home was 72."

Those numbers have drastically changed over the years. Today, "The average resident moving in is 62 years old," he says, noting that their life expectancy has grown to 92. Because of that improvement, Wellstone has shifted its model. "We as a company are pivoting away from the traditional, one-size-fits-all product built for the Depression-era customer," he says. "What we're moving to is a 'for rent' community rather than a 'for sale' community. Where you live can help you live."

Although the shift was not easy for Wellstone, it was necessary. "We've got [to meet] product demands, otherwise we'll be out of business," Lowery explains. "The baby boomers are very discerning [and] opinionated ... and our job is to cater to their needs."

## Living Better

Wellstone Companies says that the market numbers justify the shift in its business. "Seventy-eight million adults were born between 1945 and 1964, creating the wealthiest over-50 consumer group in American history and dramatically skewing the age of the population," it says. Although global economic changes forced many to reassess the practicality of investing in real estate, they still have the desire to live better, smarter and healthier lives.

"They are investing everything from medical and spa treatments to green vacations and products that help them achieve better, healthier more comfortable lifestyles," Wellstone says. "Just as in the period before the collapse of the mortgage markets, significant numbers of them are ready to move past the large home that is not only difficult and expensive to maintain, but is too large for their active, mobile lifestyle. Today's boomers still want to live carefree, comfortable, active and purposeful lives in communities of like-minded individuals."

Before 2008, they often chose active-adult condominium communities with single-level homes that ranged from \$300,000 to more than \$1 million. Now, baby boomers are changing the consumer markets for goods, services and homes "as this wave of population rolls forward," it says.

"The precipitous drop-off in numbers represented by Gen X will dominate the segment for the next 30 years," Wellstone states. "Our elderly are mostly the remaining people of the GI Generation. After they are all gone, we will turn to the Silent Generation for our elderly for the next 20 years."

"This generation is the smallest generation in the past 100-plus years and even 25 percent smaller than the current elderly generation, which is the second smallest generation," it says.







## 'The baby boomer is expecting a 10-foot ceiling ... and top-of-the-line kitchen appliances.'



### An Experienced Leader

John B. Lowery has more than 35 years of experience in commercial real estate development and construction. "[He] has worked with financial institutions, owners, developers, governmental agencies, design consultants and construction contractors in all segments of the construction industry," Wellstone Companies says.

"His development and construction experience includes medical office buildings, hotels, hospitals, retail developments and over 3,500 single family homes throughout the South and Midwest," the company says.

Lowery also was president of the Fidelity National Bank Holding Co. and chief of staff for Harold E. Ford Sr., member of the U.S. House of Representatives. Today, at Wellstone, "He is responsible for strategic planning, strategic third party alliances, banking and financial relationships, and general corporate oversight," the company says.

### Attainable Luxury

Wellstone is filling a sizable gap in the senior lifestyle market with these projects, Criminger says. The company is creating properties that are different from the usual retirement communities, assisted-living and other independent living facilities.

"What we did was look at those housing options and say, 'What can we bring to this party that is going to make our offering unique and compelling?'" Criminger recalls. To find the answer, the company performed extensive market research and spoke with focus groups. "It became more and more apparent that there was going to be a market for [this concept]."

"When you talk to people who are pre-retirement or mid-retirement, all they want is to live longer," he says. "They want to feel better."

Today, Wellstone's model is a strong alternative to developers like Del Webb that build houses and sell them to seniors, Lowery says. "I call [Wellstone's approach] 'attainable luxury,'" he says.

This fits well with baby boomers who "want to keep their cash liquid," Lowery says. "They want to preserve liquidity for other opportunities."

The economic crash of a decade ago also has played a part in their decision-making, Criminger says. "So many people who bought condos in Florida and areas like that before the crash ... were paying \$800 to \$900 per square foot," he says.

But after the crash, "They couldn't give them away," he recalls. "They don't want to put their life savings at risk buying a retirement home, because they realize things can change so quickly."

Residents also never know when they might need to spend money on medical care, Criminger says. "If \$300,000 has been invested in a retirement home and then one of the retirees has a stroke and has to go into memory care, they've got all their money in that

# MANAGEMENT



# LIFESTYLE



# REALTY



# MAINTENANCE



Always on point.

Always on call.

Always over and beyond.

Always the **Access Difference!**



# access

**MANAGEMENT**

215 Celebration Place, Suite 115  
Celebration, FL 34747  
407-480-4200  
accessdifference.com

**Hospitality is our foundation, Your happiness is our focus!**





condo and they can't get it out quickly," he says.

But thanks to Wellstone's model, residents can enjoy this kind of lifestyle more safely. "Your total commitment is a 12- or 24-month lease," he says. "You are never caught and held prisoner by your residence again."

#### Four-Star Properties

Wellstone's luxurious properties operate "very much like a four-star hotel," Lowery says. Currently, the company has three designs that it utilizes for its communities.

The first, known as "Traditions," consists of single-level residences of 1,500 to 2,000 square feet and feature exceptional landscaping, sidewalks and streetlights. At the center of each is a Wellstone club which features space for events, a fitness center, a pool, a game room and a business center.



Wellstone also has its "Flats" community, which features multiple mid-rise buildings with eight to twelve 1,800-square-foot units. The residences are designed to fit into town-center communities and feature a Wellstone club.

Lowery notes that the company's "Cottage" communities are designed as single-family homes with a 1,800-square-foot floor plan. The structures are single-story patio homes with a rear entry double-car garage and garden area.

The Cottage homes also fit into town-center communities and feature

a Wellstone Club. "These three product designs allow us to build throughout the country, depending on location," Lowery says.

Wellstone also fills each home with fine features. "Our resident is not going to be satisfied with a hollow core door and a plastic tub that we see in traditional senior housing," he says. "The baby boomer is expecting a 10-foot ceiling, a solid core door and top-of-the-line kitchen appliances."

The baby boomer generation, he adds, also tends to use the kitchen





» Wellstone Living at Craig Ranch consists of 11 five-story buildings in McKinney, Texas.



## 'We're going to go vertical [on Craig Ranch] early in the first quarter.'

family space as their primary living room, and Wellstone meets that need through its designs. "They're eating and socializing [there] and that's why we're building the largest kitchens we've ever built today," Lowery says.

"It's become the center point of their home," he continues. "In our old product, we would have the kitchen off separately, instead of being the center."

### Menu of Activities

Wellstone builds each community to fit the lifestyles of its residents, who are now far more active than previous generations, Criminger says. "These are for people who don't want to spend their whole life in a building somewhere," he says.

Some might spend their days playing

golf, while others may have more ambitious pursuits. "You'd be amazed with the number of people in their 60s that start new businesses," Criminger says. "You're not going to see that within retirement communities."

If Wellstone's residents want to learn how to prepare healthier meals, its communities offer courses. If they want to exercise more, the communities accommodate that desire, as well.

"Instead of having to drive to a YMCA or drive to a gym, it's right there [in the community]," he says, noting that its developments are staffed with wellness coaches and advisors. "If a number of our residents want to have a Pilates class, we have a Pilates studio and we'll bring in Pilates instructors to do it."

"So many people, when they reach that age, say, 'I've got some time now and I've always wanted to try painting,'" Criminger says. "Great! We'll bring in an art class or a watercolor teacher. We create a huge menu of [activities] based on a dynamic relationship with our residents, which includes their personal involvement and feedback."





## WELLSTONE COMPANIES



» Wellstone is filling a sizable gap in the senior lifestyle market with its projects.

The company also builds its developments near retail centers and restaurants. "Our folks want to go out and eat every night," Lowery says. "They don't want to stay home and eat in a dining room with the same group of people three times a day."

This has resulted in the elimination of dining halls in Wellstone's communities. "The baby boomer group didn't want the meal program when they went to college, and they don't want it now," he says.

### Project Partners

Wellstone's current projects include Wellstone Living at Craig Ranch, a \$100 million community in the North Dallas neighborhood of McKinney, Texas; Wellstone Living at Wildwood in a \$200 million community in Wildwood, Fla., adjacent to The Villages; and Wellstone Chattanooga, a \$50 million community in Chattanooga, Tenn.

Wellstone has entered into a strategic

### The Communications Expert

Wellstone Executive Vice President of Marketing Russell Criminger Jr. has extensive experience in a variety of industries. "I've spent most of my career in the marketing and communications world in advertising agencies and as an agency owner," he recalls.

This included working at WSM Television in Nashville. "I became their director of creative services and was around for Opryland Productions," he says. "It's been a broad and varied background."

"About 30 years ago, I found myself drifting more into the real estate side, working primarily at the time with condominium developers and commercial developers," Criminger says. "[We did] everything from downtown office buildings to high-rise multifamily [developments] to some of the condominium projects in the South."

After meeting John Lowery, he co-founded Wellstone, which enjoyed immediate success. "We went from basically ground zero to almost \$1 billion in underdevelopment in less than three years," he says, noting that the company has prospered with its active adult communities.

"The idea for high-end rental has taken off and continues to grow," he says. "We're going 150 miles an hour right now to catch up and meet the demands that are out there in the market for this type of product."





alliance with Beijing Construction Engineering Group, which is “one of the largest construction companies in the world,” Lowery declares. This firm is providing support and technical assistance in relation to design and construction of all of Wellstone’s communities.

Lowery has enjoyed working with Beijing Construction because it has brought “the best of both worlds” to its projects. “Their U.S. company is led by Zac Henson, who is the CEO, grew up in California and played football in Nebraska,” he says.

“He understands American business,” Lowery continues. “That, combined with the balance sheet of one of the largest companies in the world in the largest country in the world, gives us access to significant capital.”

### The Next Generation

Wellstone represents “the next generation of people living longer and healthier than

ever,” Lowery says, noting that its projects are designed for a very active resident. “Seventy-five percent of residents still go to work every day.”

Wellstone also allows its residents to avoid certain menial tasks, such as lawn care. “They want to be able to lock and leave,” he says. “We position our product just that way.”

Wellstone’s staff will mow its residents’ lawns as well as provide home maintenance. “[They clean up the] interior of the units, all the way up to changing the light bulbs,” Lowery says.

If Wellstone’s residents become ill, its staff can help with that as well. “In our communities, we offer boutique medicine,” he says, noting that the company has strategic alliances with home health-care providers.

“If one of our residents were to become ill with a non-life-threatening situation, they can call the concierge,” Lowery says. “We would dispatch a nurse or doctor to their residence. Access to 24/seven boutique medicine is included in their home in the basic services.”

Wellstone’s amenities also will include a clubhouse with state-of-the-art exercise facilities, Lowery says. “[We also will] have a sports bar that’s open with cocktails,” he says.

“We’ve got our hands full right now,” Criminger says. “Hardly





a day goes that we don't get a call from somebody else who has ... heard about what we're doing or [are looking for] some way we could work together with them. It's keeping us all really busy."

### Staying Active

Lowery sees a strong future for Wellstone. Thanks to its strategic alliance with Beijing Construction, "Our goal is to develop or franchise 100 new communities over the next seven to 10 years," he predicts.

Wellstone also might move into specialty communities that feature studio and gallery space or gardens, Criminger says. "We've got retirement-age people who love to garden," he says.

"If you move into an apartment, you cannot garden very well," Criminger continues. "But [we can] build our cottage communities around tillable land that can be built into small garden plots."

He adds that Wellstone will stay focused on active, health-based communities with features such as running trails and walking paths. "People my age don't want to be secluded somewhere," he says. "We like the idea of a community with activities."

Wellstone also plans to launch a franchise division that targets both developers and homebuilders who want to develop products for active adults within their communities, Lowery adds. "[It would be] a turn-key franchise solution where we provide the plans, the specifications and the site selection," he explains.

"[We would also] assist with their financing and manage them much like a hotel hospitality model, where one could purchase a franchise for Marriott or Holiday Inn," he says. "We see the next 20 years of active adult housing as a hospitality business and we've got to be ready for Generation X and the next ones coming, because it's going to continue to evolve."

### Tenets of Wellness

Wellstone has aligned with Dr. George Petry, M.D., for its wellness program. Petry, who



## A Broad Portfolio

Wellstone's projects also include the 23-story JW Marriott Hotel in Houston, which features 515 renovated guest rooms. "Conveniently located in the Galleria area, this Houston luxury hotel is near more than 200 exclusive stores while conveniently located to the famous Holocaust Museum and the Museum of Fine Arts," the firm says, noting the hotel has an on-site fitness center, a pool, hot tub, and 40,000 square feet of meeting and event space.

The company's projects also include the Lincoln Center Office Tower, a skyscraper in Miami. Standing 450 feet, the tower stands 34 stories and features 677,677 rentable square feet of class A office space. "The Lincoln Center is clad in polished granite and silver reflective glass," Wellstone says.

Its Miami projects also include Brickell Bay Office Tower, which is located in the city's Brickell financial district. "Directly overlooking Biscayne Bay, the 32-story, 280,500-square-foot building with unobstructed views of the water is one of Miami's most unique business," the company says.

The facility stands on a 1.75-acre site at 1001 Brickell Bay Drive with one story below grade and eight above-grade parking levels. "Rentable floor areas range from 10,780 square feet to 18,622 square feet," the company says. "Rentable office and commercial space totals 280,500 square feet."

Wellstone's projects also include the Hilton Hotel in Knoxville, Tenn., located in the city's downtown area. "This modern 18-story high-rise hotel is within walking distance to the World's Fair Park, the University of Tennessee campus and Market Square, an epicenter of shopping, dining and entertainment," the company says.

"The 317 guest rooms and seven suites feature the most accomplished arrangements of contemporary furniture and urban decor around. Catering to an audience of professionals and business travelers, the hotel also offers over 14,000 square feet of meeting and banquet facilities."





Introducing the chic side of Fort Worth, Texas architecture, **Schaumburg Architects** is a world renowned design firm headquartered in Fort Worth, Texas. Known for our uniquely designed residential and commercial structures, we also develop upscale condos and chic urban lofts throughout Fort Worth, Texas.

- Residential architecture
- Commercial
- Restaurants
- Retail
- Medical & Dental
- Master planning
- Highrise
- Mixed use
- Townhomes
- Condos and lofts
- Office space
- Schools
- Churches
- Museums
- Remodeling
- Adaptive Restoration

# SCHAUMBURG

A R C H I T E C T S

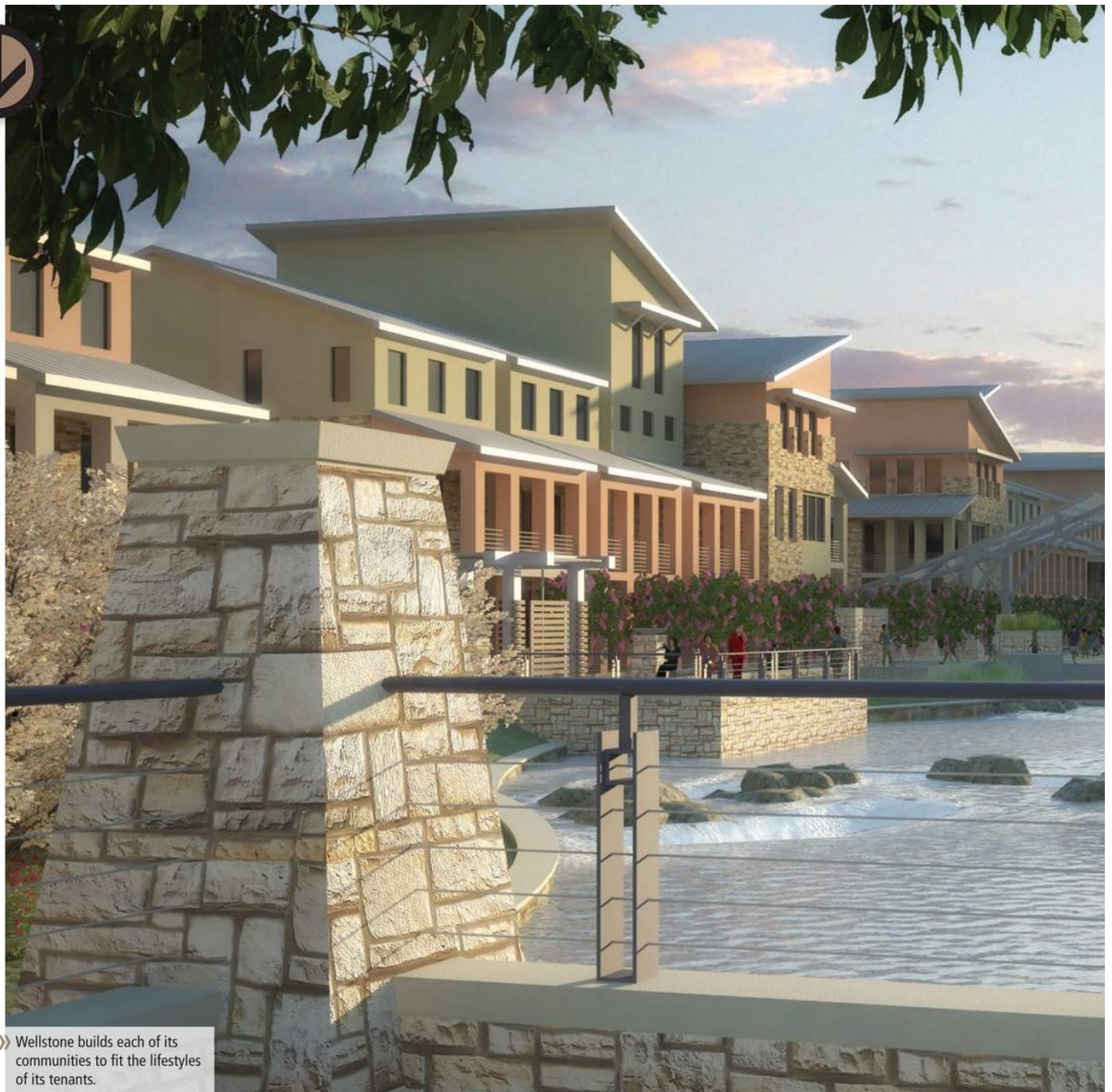
817 W. Daggett Avenue, Fort Worth, Texas 76104 | P: 817. 336.7077 | F: 817. 336.7776

[SchaumburgArchitects.com](http://SchaumburgArchitects.com)





## WELLSTONE COMPANIES



» Wellstone builds each of its communities to fit the lifestyles of its tenants.

resides in Oklahoma City, owns and operates First Choice Urgent Care, which provides primary care, minor emergency care, occupational and wellness medicine to the local community.

He also serves as the chief medical officer of GHP Partners LLC, a medical consulting firm that provides wellness programs and tailored healthcare plans to local businesses and organizations.

"Within our multi-state developments, we want to impact the quality of life of our residents," says Petry, who is also the director

of Wellstone Wellness. "Our communities will center around the idea of wellness."

According to Petry, there are multiple tenets to wellness, including emotional, physical, environmental, financial, spiritual and social well-being. "The Wellstone communities will successfully unite all of tenets of wellness once completed," he says.

"We're going to focus on the physical or health component of that, which will encompass a lot of the lifestyle amenities that are built-in variables within these communities," he says, noting that these will go beyond the models of exercise.

"Once the sites are fully operational, we're going to be involved in nutrition programs that can be brought into the





centrally located fitness centers where we instruct and teach residents how to prepare healthy foods," he says. "Residents will have access to personal trainers, healthcare professionals, and lifestyle [coaches] that can help individuals maintain their current state of health.

"This will be in addition to the medical services offered, which will be full family and primary care access with a walk-in model," he says, noting that GHP will enable the clinics to bring the services on site.

#### Providing Care

GHP's operations will include the Santé Clinic at Craig Ranch, which will provide primary, immediate care and concierge medicine. The clinic's primary goal is "to enable participants to incorporate the principles of evidence-based health behavior, wellness coaching, health promotion and disease prevention into clinic practice," GHP says.

Santé's integrative primary care model will meet dietary needs. "Dietician consults will be provided to patients based on a specialized questionnaire," GHP says. "Scheduled telemedicine clinics will be used to facilitate this service to our members."

Through the clinic's exercise program, "Personal trainers with an expertise in senior fitness will be available for consultation to





## WELLSTONE COMPANIES

» Wellstone's properties operate like a four-star hotel, complete with a concierge.



members enrolled in the program," GHP says. "Members will utilize a exercise prescription tailor-made to each individual's need."

When it comes to disease treatment and prevention, "Members in need of chronic disease care will be addressed as a whole person to include preventive screenings, annual check-ups and specific disease treatment using best evidence-based practices," GHP says.

Additional services at Santé will include a certified chef. "We will partner with local culinary professionals to create a healthy living/easy-to-prepare cooking classes several times a week," GHP says.

### Having an Influence

Petry credits the improved health of baby boomers to the advances in technology and

medicine. "Scientific innovations in medicine have a significantly increased our human life span over the decades and this has led to improved efforts of disease prevention," he says.

"Disease prevention is now built into our healthcare system that not only helps us cure disease but stops disease patterns in their tracks," Petry says. "This has had a huge impact on mankind in general.

"It's caused a significant increase in our average lifespan," he says. "You are now seeing more and more active seniors that are still living with the same quality of life and state of health that they may have had when they were middle aged.

### Something Unique

Wellstone utilizes Celebration, Fla.-based Access Management as the national property manager for its communities. Access President Barry J. Caplan explains that the two companies began working together after an introduction by a mutual acquaintance who works in both construction and finance.

"[They] said, 'John is creating a concept that could go nation-





# SUMMIT

## CONTRACTING GROUP, INC.

We Firmly Believe That  
**“Quality Projects Built By Professionals”**  
 Is Not Just A Tag Line, It’s Truly Who We Are!



Financial strength, bonding capacity, extensive HUD 221(d)(4) experience and our long standing subcontractor relationships drives us to be one of the most competitive general contracting firms in the market today. We pride ourselves on delivering your product on time, within budget and without change orders while maintaining quality and safety. This is achieved through the implementation of innovative management and industry leading quality-control programs.



1000 Riverside Ave, Jacksonville, Florida 32204

**(904) 268-5515**

[www.Summit-Contracting.com](http://www.Summit-Contracting.com)





wide," Caplan recalls, noting that he saw potential in Wellstone. "The platform of lifestyle communities for rent is something that's unique. That really made us focus on what John was doing."

This seems to be a particularly strong opportunity when considering the fact that 75 million baby boomers will turn 55 in the next 10 years, Caplan says. Although his relationship with Lowery and Wellstone is relatively new, he praises the company and its leadership.

"John has a plethora of experience," Caplan says. "His product in the market is second to none. The Wellstone communities really focus on high-end product and the significant construction of communities."

But the communities deliver more than just bells and whistles, he asserts. "They also care about the residents," Caplan says. "It's important to not only have great service, but you have to have a terrific product."

## 'We anticipate building 100 new communities over the next five years.'

### Property Platforms

Access Management operates with two platforms, Caplan says. Its Access Hotel and Resorts platform has delivered AAA Four Diamond Service to guests since its start in 2006. Today, "We have about 14 different hotels and 14 different owners," he says.

These properties range from "a small, independent boutique to a downtown urban boutique," he says. "It's really about identifying the ownership, delivering the service and creating a cultural environment where the [guests] come back."

Its second platform, Access Residential Management, started operations in 2007 and utilizes its hospitality expertise when managing residential properties. "We formed the residential management business when we believed there was a void in the homeowners'







## Setting Itself Apart

Wellstone is utilizing the Jacksonville, Fla.-based Summit Contracting Group Inc. as the general contractor on its Chattanooga project. "Under Marc Padgett's leadership, Summit's commitment to excellence, unparalleled customer service and overall team approach represents a no-nonsense, relationship-driven mindset that has contributed to the company's huge success," it says.

"Due to this, Summit is very proud to announce their hard work has paid off, evidenced by ranking No. 1 on the top general contractors list by MFE, not to mention their rankings by Engineering News-Record, Student Housing, JBJ, plus the many other published ranking that specialize in their industry," it says. "Summit's greatest complement through these achievements is that they were obtained mainly through repeat clients and referrals that we have close relationships with, which proves to be a great reflection of their success."

Along with its experienced management and strong subcontractor relationships, "Summit has been able to provide their clients with successful projects throughout the nation," Summit says. "These same clients have come to appreciate their ability to travel, as well as the fact that they do not need to gamble on or build a new contractor relationship in every region they choose to develop in.

"Summit prides themselves on developing [the client's] product on time and within budget, while still maintaining quality and safety," it says. "This is achieved through the implementation of innovative management and industry leading quality control programs, such as moisture intrusion, mold prevention, scheduling, budget tracking and much more.

Superior product, a genuine commitment to quality control and the ability to nurture and build solid client relationships over the years have been just a few of the many qualities that have set Summit apart from its competition."

» Wellstone has developed a portfolio that also includes hotels and office towers.



service [industry]," Caplan recalls. "That's really been our [specialty]. [We use] the hospitality components and give the service levels that traditional homeowner management organizations don't."

This approach has paid off for the company. "We're now up to 65 communities," Caplan says, noting that the majority of its communities are active lifestyle communities with many of them catering to the active adult community. "Most of them have lifestyle community components. Not only [do they] have a clubhouse but also a special events director and a fitness director."

The amenities in these communities are often like hotels, making them good fits for Access Management. "There could be fishing, a 30,000-square-foot fitness center or tons of activities that [create] a self-contained environment for the residents."

Access Management works for the top-five homebuilders in the nation, who also are moving to an active adult lifestyle platform, Caplan says. "That ... is really advancing," he says.

These communities used to only feature clubhouses, but now "it's a clubhouse that might have a restaurant or it might have a resort style pool," he says. "The total, self-contained environment for an active adult is right there at your finger tips."

Going forward, Access Management not only wants to grow in its home state of Florida, but also in major lifestyle markets throughout the country. "For instance, Pulte Group had Texas, Arizona and California, where there's large land tracks and the ability to build these lifestyle communities," he says.





## WELLSTONE COMPANIES



» Wellstone's projects include the Brickell Bay Office Tower, located in Miami.

"I think we could have a significant impact in the lifestyle industry," he says, noting that Wellstone could go nationwide. "John's concept is a terrific one for people that don't want to put the \$150,000 down payment on a home. "That fills a void in the industry," he says. "Partnering with Beijing Construction, which is one of the largest construction companies throughout the nation, will have a significant impact on our development schedule."

### Master of Design

Wellstone utilizes Schaumburg Architects, a Fort Worth, Texas-based design firm, as the master planner on all of its projects. Its owner, Ken Schaumburg, has operated a private practice since 1975. "We've done projects in virtually every state in the United States and Vancouver," Schaumburg says, noting that the company also has completed projects in Brazil and the Middle East. "I had an office there for several years, I did work for a few sheiks and several clients."

### A Seasoned Veteran

Zac Henson is the CEO of BCEGI-USA INC., a subsidiary of Beijing Construction Engineering Group (BCEG), based in Beijing, China. He joined the company in his current role in 2007 after serving as the CEO of Tri Star Construction Co.

His previous experience includes multiple projects in the United States and the Caribbean, including Themed Construction of the Atlantis II in the Bahamas, as well as attractions at Disney California Adventure and Universal Studios' Famous Film Streets and Amphitheater. In addition, while working at Tri Star, he built more than 300 restaurants.

Henson notes that he met John Lowery eight years ago. "We got reconnected around the first of the year," he recalls, noting he has enjoyed the partnership. "It's been pleasant working with Lowery and Wellstone on a number of different projects."

Schaumburg also served as a partner in several development companies in the 1980s. "We had over \$500 million in development going," he recalls. Today, Schaumburg Architects keeps him very involved in the architecture, development and construction of Wellstone projects.

Schaumburg joined with Lowery and Wellstone three years ago.



# The **Santé Clinic** at CRAIG RANCH

**Mission statement:** To become the leading provider of Whole life health/wellness and to develop a brand identity synonymous with quality health care and ancillary services to active retirees.

**Strategic Vision:** Wellness for a lifetime.

## *The Santé Clinic Concierge Service and Wellness Plan*

### **Unprecedented Care:**

- » Home and place of business visits
- » Comprehensive physicals
- » Same-day/next day appointments – only if needed
- » 24/7 phone, text and e-mail access to Santé physicians and physician assistants
- » Your provider will get you the acute, preventative or chronic disease care you need.

### **The Santé Clinic Concierge Service and Wellness Plan includes:**

- » Membership with the Santé Clinic Wellness program (a whole person concept tailored to each individual's mental and physical health care needs incorporating the six dimensions of the wellness paradigm)
- » Personal care and attention to health care needs to achieve optimal wellness
- » Comprehensive care managing all aspects of health including acute disease treatment, chronic disease management, and disease prevention
- » 24/7 access to a physician or physician assistant via phone, email, and text/instant messaging
- » Comprehensive annual and as needed physical exams
- » Treatment rendered without office visit when appropriate
- » Same/next day appointments with expedited office visits
- » Individual patient electronic medical records
- » HIPPA compliant access to individual medical records
- » Coordination of care with specialists, surgeons, and other health care entities
- » NO extra charges for email/phone/text contact
- » Includes option for and availability of afterhours visits to patients' home (fee-for-service)
- » Fee-for-service costs:
  - \$0 for physician home/business visits during regular business hours (M-F 8 a.m. through 5 p.m.)
  - \$25 for after-hours visits weekdays after 5 pm; \$50 weekends; \$100 holidays
  - Santé Clinic Concierge service does not collect co-pays; however, we will bill your insurance. Each patient may request the necessary information to seek reimbursement from their health insurance company for a portion of any visit

*The Sante Clinic - wellness for your lifetime*





## 'Residents will have access to personal trainers [and] healthcare professionals.'

"I began doing the architecture work and we began doing numerous developments in Texas, Tennessee and Florida," he says. "He moved his Texas office into mine, so we've shared an office for three years."

He praises Lowery's leadership. "He's one of the most knowledgeable people I've encountered in my three-year experience with numerous private activity bond deals," Schaumburg says.

"John Lowery is brilliant when it comes to structuring private activity bond deals," he continues. "He's an expert in this realm second to no one."

### Living Large

The Wellstone communities have been a good fit for Schaumburg's talents. "Residential, high-end space is something we've been very active in my entire career," he says.

"We're taking those living amenities and incorporating them into the space," he says, noting that it gives them the feel of "a high-end lifestyle with the amenities in a much smaller space."

"What's unique about our 1,800-foot cottages is the fact that [the residents] live large," Schaumburg says. "The amenities [that] they experienced in their large homes we offer in the smaller cottages."

For example, the cottages feature "two bedrooms instead of the four or five bedrooms," he says, noting that they also have a study, oversized two-car garages and ample storage space.

"All of our units have front porches and lushly landscaped front yards that encourage that neighborhood walkability and communication between house to house," he says.

Schaumburg is proud of Craig Ranch, which will contain all of these features in a five-story product. "This product has not previously existed," he says.

"These people are not interested in renting in a market-rate apartment complex with a lot of millennials running around the swimming pool and clubhouse," Schaumburg says. "So we've created this new niche, totally custom around the baby boomer."

Schaumburg, who is 67 years old and owns a lake house and a downtown loft, says Wellstone's projects would fit into his own personal lifestyle. "It's a high-end product that I would feel comfortable in," he says, noting that its garages would accommodate his two motorcycles and two cars.

He sees a strong future for the active adult market. "In the past, you became an active adult in your [late 60s]," he says. "Today, that person's running for president and not even beginning to think about retirement."

"Our average customer today ... is now 70 to 85. The baby boomers are getting to be a huge part of our population," he says. "They're living much longer and are much healthier [since] the healthcare has been much improved."

Schaumburg sees a strong future for the relationship between Schaumburg Architects and Wellstone. "At this point in my career, I'm more interested in projects that I have a vested interest in," he says. "The large majority of my work in the future in this arena will be with Wellstone." ♦

