

CHOOSING A RETIREMENT COMMUNITY

This checklist is for guidance only and is not all-inclusive. Please contact us to learn more about the financial, lifestyle, and other considerations surrounding your transition to retirement community living.

Current Finances:

Current monthly expenses: \$ _____

Monthly amount available to surviving spouse: \$ _____

Approximate costs of staying in your home:

- Adaptive updates: \$ _____
- In-home services: \$ _____

Approximate costs of moving:

- Closing costs: \$ _____
- Moving costs: \$ _____

Retirement Community Costs:

Entrance fee: \$ _____

- Refundable
- Non-Refundable

Basic monthly fees: \$ _____

Any additional fees: \$ _____

Total projected retirement community costs per month: \$ _____

- Are Medicare/Medicaid accepted?
- Are any fees tax-deductible?
- Can your long-term care policy be utilized?
- Cost increases during the last five years?

Care Options:

- Independent living
- Assisted living
- Nursing care
- Memory care
- Hospice
- Therapy options e.g., physiotherapy, occupational therapy _____
- Transition assistance
- Differing care levels for couples
- Health restrictions upon entry
- Private rooms if care is required
- Other: _____

Campus:

Campus neighborhood: _____

Public transport options: _____

Proximity to:

- Family & friends
- Doctors and medical facilities
- Banks
- Spiritual centers
- Shopping
- Other: _____
- Grounds
- Communal spaces
- Disabled accessibility
- Elevators

Individual Accommodations:

- Remodeling / redecorating allowed
- Emergency call systems
- Safety modifications: _____
- TV & Internet options: _____
- Individual A/C and heating controls
- Cellphone coverage

Amenities & Services:

- | | |
|--|---|
| <input type="checkbox"/> Unit maintenance | <input type="checkbox"/> Pet sitting |
| <input type="checkbox"/> Housekeeping | <input type="checkbox"/> Beauty parlor |
| <input type="checkbox"/> Laundry services | <input type="checkbox"/> Gift shop |
| <input type="checkbox"/> Computer support services | <input type="checkbox"/> Post Office |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> Parking for your vehicle |
| <input type="checkbox"/> Fitness facilities | <input type="checkbox"/> Parking for guests |
| <input type="checkbox"/> Other: _____ | |

Activities:

- | | |
|---|---|
| <input type="checkbox"/> On-site activities | <input type="checkbox"/> Frequency: _____ |
| <input type="checkbox"/> Excursions off-site | <input type="checkbox"/> Transport: _____ |
| <input type="checkbox"/> Extra cost: \$ _____ | <input type="checkbox"/> Other: _____ |

Food Services:

- | | |
|--|---|
| <input type="checkbox"/> Additional costs: \$ _____ | <input type="checkbox"/> In-room service |
| <input type="checkbox"/> Sample menus available | <input type="checkbox"/> Snacks |
| <input type="checkbox"/> Overseen by nutritionist or dietician | <input type="checkbox"/> Portioning |
| <input type="checkbox"/> Buffet versus plated service | <input type="checkbox"/> Hours of operation |
| <input type="checkbox"/> Hot and cold options | <input type="checkbox"/> Guest diners |

General Queries:

- Waiting list: _____
- Average age of residents: _____
- Staff-to-resident ratio: _____
- Average length of service per staff member: _____
- Staff training: _____
- What's the average length of service for staff members? _____
- Is the retirement community for-profit or non-profit? _____
- How long have they been in business? _____
 - Review their financials
- What rating did the last two State inspections return? _____
- Written policies for privacy, complaints, and other matters?
- What happens if a resident runs out of funds? _____

Additional notes: _____

Professional Advice:

- Have you reviewed the financial considerations of a retirement community with your financial advisor?
- Have you reviewed a specimen contract with your attorney?