



What to Look for When Choosing a Retirement Community

Today's seniors have more lifestyle choices than any generation in history...and they are making them earlier than ever! The "second half" of our lives provides opportunities for new experiences and personal growth that may last as many as 30 years. A wide range of lifestyle options have become available to meet the changing needs and desires of an active, healthier, more "vibrant" group of seniors. When choosing the retirement lifestyle that's best for you there are many factors to consider, including your present and future needs, your personal preferences and your financial situation. The following four considerations should be your top priority:

- 1) The history, reputation and financial stability of the community you consider*
- 2) The type of living accommodations that are offered*
- 3) The scope of services offered*
- 4) The types of amenities available, including health care services*

The following Cost Comparison Worksheet, Community Checklist and Services and Amenities Checklist are included to support you in developing the answers you need to choose the right community for you.

Community Checklist

- Consider the setting of the community. Is the landscaping attractive and well maintained? Are the buildings connected to allow you convenient access during inclement weather without going outside? Is there adequate parking?
- Use the Services and Amenities Checklist and get a complete informational packet – including the application for admission, fee schedules, floor plans, resident contracts and other available materials.
- Get the background on the community: when and how it was established, who owns and operates it, and who manages the community. Ask for financial statements.
- Get detailed information about all fees and what they do and do not include. Investigate whether or not monthly fees are subject to increase and under what conditions.
- Be sure to inquire about the requirements for various levels of care and what levels of care are provided.
- Find out all you can about the philosophy and track record of management. Ask for a copy of the corporate mission statement
- Is there a waiting list? If so, how does it work? Is a deposit (not an entrance fee) required?
- Ask to speak with several residents to see how they like the community. Ask if you may stay for lunch or dinner so you can sample the food and service.



Services and Amenities Checklist

Private Residence

- | | | |
|--|--|--|
| <input type="checkbox"/> Studio | <input type="checkbox"/> 1 bath | <input type="checkbox"/> Floor treatment |
| <input type="checkbox"/> 1 bedroom | <input type="checkbox"/> 1-1/2 bath | <input type="checkbox"/> Window treatments |
| <input type="checkbox"/> 2 bedroom | <input type="checkbox"/> 2 bath | <input type="checkbox"/> 24-hour emergency call system |
| <input type="checkbox"/> 3 bedroom | <input type="checkbox"/> Kitchen | <input type="checkbox"/> Smoke detector |
| <input type="checkbox"/> Villa/cottage/carriage home | <input type="checkbox"/> Patio/balcony | <input type="checkbox"/> Sprinkler |

Community Amenities

- | | | |
|---|---|---|
| <input type="checkbox"/> Community dining room | <input type="checkbox"/> Chapel | <input type="checkbox"/> Country store |
| <input type="checkbox"/> Private dining room | <input type="checkbox"/> Bank | <input type="checkbox"/> Pool (heated?) |
| <input type="checkbox"/> Guest suites | <input type="checkbox"/> Beauty/Barber shop | <input type="checkbox"/> Fitness center with instructor |
| <input type="checkbox"/> Adequate parking | <input type="checkbox"/> Café/Snack Shop | <input type="checkbox"/> Wellness program |
| <input type="checkbox"/> Computer/internet access | | |

Resident Services

	<i>Incl.</i>	<i>Add'l. Fee</i>
Meals in dining room	—	—
How many included?	—	—
Flexible meal plan	—	—
Cafeteria	—	—
Buffet	—	—
Served by wait staff	—	—
Home tray service	—	—
Grounds maintenance	—	—
Security service	—	—
Apartment cleaning	—	—
Flat linens laundered	—	—
Washer/dryer in unit	—	—
Scheduled transportation	—	—
Storage outside living unit	—	—
Utilities	—	—
Other _____		
Other _____		

Health Care Services/Centers

	<i>Incl.</i>	<i>Add'l. Fee</i>
Health clinic/nurse's office	—	—
Physician services on-site	—	—
Home health care available	—	—
Short- and long-term skilled nursing care	—	—
Alzheimer's/dementia care	—	—
Medical center on-site	—	—
Assisted living:		
available	—	—
provided in home	—	—
Rehab services	—	—
Dietician on site	—	—