

RETIREMENT COMMUNITY

Finding The Perfect Retirement Haven

	YES	NO
1 Have you identified your top priorities for a retirement community (e.g., location, amenities, care services)?	<input type="checkbox"/>	<input type="checkbox"/>
2 Are you familiar with the types of retirement communities available (independent living, assisted living, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you visited at least three retirement communities to compare?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you know the financial obligations associated with each community you're considering (entrance fees, monthly fees, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you discussed your potential move with family or a trusted advisor?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you understand the healthcare services provided by the communities you are considering?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you checked the resident satisfaction and reviews of the communities?	<input type="checkbox"/>	<input type="checkbox"/>
8 Are the communities you're considering accredited by a recognized senior living accrediting body?	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you considered your long-term health needs when choosing a community?	<input type="checkbox"/>	<input type="checkbox"/>
10 Do you feel confident about the social and recreational activities available in the communities you're considering?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:



7–10 Yes Answers: Well Prepared For Community Transition. You've done your homework well and are on a solid path to selecting a community that fits your needs and lifestyle.



4–6 Yes Answers: Progressing, But Clarify Options. You're making good progress, yet it's important to deepen your understanding and comparison of options to ensure the best decision.



0–3 Yes Answers: Need To Address Key Areas. Consider taking more steps to thoroughly explore and understand the options and support available to you in retirement living.