



What's On Your List?

How do the retirement communities you're considering stack up against your list of wants and needs? Print this checklist, use it for planning, and take it along with you to keep your highest-priority questions top of mind during your visit.

More than a feeling. What's your gut reaction when you walk through the front door? Does this community feel like somewhere you'd proudly call home? Take note of your instincts — they can tell you a lot.

Name of Community: _____

Date of Visit: _____

Location:

- Does the surrounding area offer a variety of cultural and recreational activities?
- Is the community conveniently located for visiting family and friends?
- Does the surrounding neighborhood feel safe and welcoming?

Finances:

- What is included in the monthly fee? How much do those fees increase year over year?
- If it is an entrance fee community, what are the refund options?
- Does the community offer inclusive care and/or fee-for-service options?
- Do monthly fees change if residents move to another level of care?
- What extra fees do residents typically incur?
- Does the community accept long-term care insurance?
- What's the long-term financial stability of the organization? Do they carry any debt?

Lifestyle programming:

- Does the community offer programming that sparks curiosity and inspires lifelong learning?
- Is wellness and fitness programming approachable for all fitness and activity levels?
- Does the community offer amenities that are important to you?
- What are the details of the new-resident orientation program?
- Are there a variety of clubs and other interest groups? Can residents start their own?

Resident support:

- What is employee turnover like?
- What are the community's employee and resident satisfaction scores?
- What continuing education and ongoing training do community employees receive?
- What is the community's emergency preparedness plan?



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Other Amenities:

- Is the community pet friendly?
- Is parking available and included for both residents and guests?
- Do residences offer safety features like an emergency alert system?
- Can residents decorate and customize their own apartments according to their personal taste?
- What type of privacy does the community's construction offer?
- Is there a move-in coordinator available?

Caregiving:

- Is there an on-site care center?
- What levels of care are available? What therapy services are offered?
- What is the staff-to-resident ratio?
- Are nurses on-site or on call throughout the day and night?
- What is the care center's Medicare.gov rating?
- What is the community's process for routinely assessing a resident's need for care and services?
- Is there a health and wellness clinic available to residents in independent living? And what services are offered?

Dining services:

- Are there a variety of restaurant options to fit residents' active lifestyles (grab-and-go vs. sit-down dinner service)?
- How much variety do the restaurants' menus offer from day to day?
- Do the restaurants and bars offer a variety of wine and cocktails?
- How can residents entertain friends and family on site?
- Can my individual dietary preferences and requirements be accommodated?
- Is there a dietitian or nutritionist on staff?
- What credentials do your dining and culinary teams possess?

Atmosphere:

- Are visitors greeted immediately upon arrival?
- Are there residents moving around throughout the community? Is the atmosphere lively?
- Is staff throughout the community friendly and professional? Do they greet residents by name?