

STRAIGHT TALK WITH

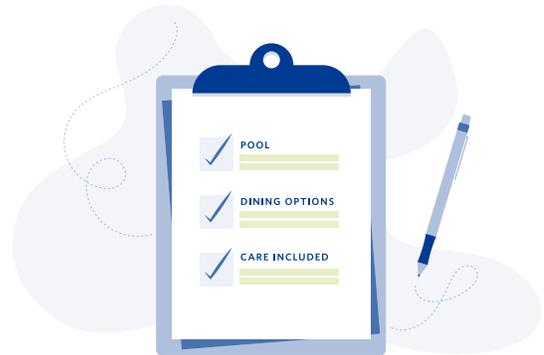
What's on Your Checklist?

WHAT'S ON YOUR LIST FOR RETIREMENT LIVING?

We all make lists, from the mundane to the pie-in-the-sky: grocery lists, to-do lists, wish lists, bucket lists.

Lists are how we organize our wants and needs, keep tabs on our progress, and prioritize the items at hand. And many things you love about your life may naturally come together into a list as you consider your next move.

Having a clear sense of what's really important as you embark on this decision-making process will keep you from getting distracted by "shiny objects" — think features and amenities that don't ultimately matter to you — and help you make the best choice for your future.



What's on your list today may change as you age. (For instance, having delicious restaurants at your doorstep may become much more appealing than cooking all of your meals in your well-appointed chef's kitchen.)

What's on your list? Here are a few suggestions to consider and a downloadable tool to help bring your list to life.

LOCATION

Location is the first thing on anyone's mind when picturing a move. But what about your location is the most important?

Is it being near family so you can watch your grandkids grow up? Is it proximity to your network of friends, medical providers, or perhaps your faith-based community? Is it choosing a community near the ocean, the mountains, or even a bustling metropolis?

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Or is it all about access to activities? If you need cultural attractions close at hand — the performing arts, museums, continuing education, shopping, sports — or a great nearby movie theater to take in a show on Friday nights, be sure they're on your list.

YOUR LOVED ONES

Family and friends likely rank high on your list as you approach this decision. When you visit a community, ask yourself whether your family will feel excited to visit and spend time with you there.

Are there great hotels nearby for your extended family when they visit, or perhaps even a guest suite at the community? What about family-focused activities for your grandchildren to enjoy?

Will your friends be able to visit for lunch, join you for a game of bocce ball, or meet up for an afternoon of shopping?

YOUR HOME

Chances are, the apartment or villa you select for this move will be smaller than where you're used to living right now. But beyond the size, it's important to consider your in-unit must-haves:

- How much space do you realistically need — to be physically comfortable, but also to accommodate the important personal items that make your house feel like a home?
- Will you be allowed to bring your furry friend with you?
- Is an open-layout living area — perfect for entertaining — important to you?
- What fixtures and finishes will help you feel comfortable and love your new home? (Vi offers several opportunities to customize your new unit!)

PEOPLE

In the 2017 Aging in Cities survey, commissioned by Welltower Inc.,¹ seven out of 10 respondents said the ability to meet new people is key in the community they choose.

What kind of people do you want to surround yourself with? Looking to meet your next golf partner or symphony seat mate within the community? Perhaps you'd like to meet another couple for double dates, or a group of ladies to enjoy happy hour with! Be sure you factor people into your list.

STAFF & SERVICE

If your friends and neighbors are important to your everyday happiness, the employees

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and service staff you'll encounter every day probably will be, too. As you tour a community, look around: Are staff members smiling and friendly, even toward visitors? Do they greet residents by their names?

Ask the communities you're considering about their employee turnover and employee and resident satisfaction scores — those factors can tell you a lot about the staff and service they provide.

AMENITIES

Your everyday surroundings matter more than you might think. If you think about your life now and know you'd miss the sound of birds outside your window in the morning — or the luxury of an early tee time before the course gets too crowded — you know that's a consideration that belongs on your list.

So, what amenities do you want just beyond your front door?

A swanky bar to enjoy a martini before dinner? A common living room for coffee and conversation? A swimming pool to do your laps? Beautifully landscaped grounds to explore on a gorgeous day? A charging station for your electric car? A well-equipped gym to stay fit?

FOOD AND DINING

Then there's the culinary question: Do you just need your three daily squares, or are you looking for a true dining experience, complete with wine tastings, craft cocktails, and hand-made desserts? Perhaps you want chef-driven restaurants on site, with a variety of menu options: bacon-wrapped pork tenderloin one night, fresh spring asparagus risotto the next. What about access to healthy grab-and-go options like salads and wraps?

Maybe you're a foodie who loves entertaining with a home-cooked meal. Or, perhaps you want to be just a short drive from the affordable eats of a local Italian trattoria. Whatever your tastes, make sure your list reflects that.

COMMUNITY LIFESTYLE

One of the biggest benefits to moving into a retirement community is access to a wide variety of lifestyle programs, both onsite and off: lectures, art classes, cultural outings, fitness programming, and more. Ask to see a monthly calendar of events, and perhaps even sit in on a popular fitness class!

Do you love to socialize with people who share your passions? Find out about the clubs and committees that are active in your community. Who leads them? Do they align with your interests? And if not, are there opportunities for residents to start new clubs?

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CARE

The list item that few want to think or talk about may ultimately be the most important to you down the road. (According to the Aging in Cities survey, 61 percent of adults say the need for high-quality care actually tops their list.)¹

The first question: onsite vs. offsite. Is on-site care a high priority for you in a Life Plan or Rental Community? Is the ability to move from independent living for a short-term care need — such as a visit to skilled nursing rehab after a knee replacement — important to you?

Then there's the cost of care. Some communities, including type A Life Plan Communities, build the cost of care into your initial investment, allowing you to plan ahead for care costs. If you're moving to a rental community, you'll have to pay the current market rate for any care services you require later on. If you have long-term care insurance, ask how this will fit into your options.

Equally important to access and cost is quality. Consider the number of staff — as well as their credentials — and how existing residents feel about how they're taken care of. (Do they enjoy the food? Are there still activities to enjoy? What's the social scene like?)

Medicare.gov also maintains regular ratings of nursing homes throughout the United States — you can look up many of the communities you're considering using their resource called Nursing Home Compare.

WHAT DOES YOUR LIST LOOK LIKE?

Remember, there are no silly priorities. If thinking of your life without something keeps you up at night, it belongs right where it is on your list. Still not sure where to start? We've created a downloadable tool to help bring your list to life.

Once you've created your list, keep it top of mind as you evaluate your options, whether you're interested in a Life Plan Community or a rental community followed by assisted living or even skilled nursing care services down the road.

Do you have questions about how a Vi community stacks up against your list? We've helped thousands of prospective residents sort through their priorities.

REFERENCES

1. How to Find the Right Senior Living Option? Prioritize

(American Seniors Housing Association)

