

RETIREMENT LIVING PLANNING TOOL




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Finding the perfect senior living community can be both fun and challenging at times. Taking the time to fill out this workbook will help put you on the right path to making the decision that is best for you.

Essential Questions to Guide Your Research

What are the primary goals you hope to accomplish by moving?

What is important to your lifestyle?

What activities, social engagements or daily living challenges do you feel may be improved by living in a community?



Who is important to include in your decision-making process?

What are your plans if a sudden change in your health or physical abilities means you require additional support?

What are your financial goals?



What is your approach to the future—are you a planner or do you take it as it comes?

What is your understanding of the costs that may be incurred if you need nursing care, assisted living or home health care as you age?

In the eventuality of a “what if,” what plans do you have to protect yourself from the cost?



Retirement Living Community Planning Worksheet

When do you wish to move?

- Within a year
- 1-2 years
- 3-4 years
- Undecided

How much are your current monthly healthcare expenses?

- Less than \$500
- \$500-\$1,000
- \$1,000-\$1,500
- \$1,500-\$2,000
- \$2,000-\$2,500
- \$2,500-\$3,000
- More than \$3,000

How much space are you looking for?

- Less than 1,000 square feet
- 1,000-1,200 square feet
- 1,200-1,500 square feet

How many bedrooms are you looking for?

- Studio
- One
- Two

Do you have money available to pay an entrance fee?

- NO YES
- Less than \$45,000
- \$45,000-\$100,000
- More than \$100,000

What is your desired monthly housing budget?

- Less than \$2,000
- \$2,000-\$2,500
- \$2,500-\$3,000
- \$3,000-\$3,500
- \$3,500-\$4,000
- \$4,000-\$4,500

Which of these factors are important to you in finding the right life plan community?

- Financial assistance
- Socially minded community, shared values
- Convenient, your target location
- Cultural opportunities in the nearby community
- Large (*multiple buildings, larger residential population*)
- Small (*fewer or one building, smaller residential population*)



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A BHI AFFILIATE

Clark is a leading senior living community in Grand Rapids, Michigan offering a range of living options and services including assisted living, independent living, memory care, skilled nursing and respite care.

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