

which we will discuss in the next chapter. If your budget is not limited, you are looking for a resort-style retirement, and you like the idea of having more services available as you need them without having to move, look into a CCRC.⁷

FINDING YOUR IDEAL FACILITY

Hopefully, the content that we have covered so far will get you and your team into the right mindset to find a facility.

NEEDS AND WANTS

Identify your current needs, forecast your possible future needs, and identify your wants or “wish list.” Price is important, but do not let it be the sole determining factor in your decision.

When calling local facilities to ask how much they charge, most will tell you, “It depends on what you want or need.”

Pricing is more complicated than booking a hotel room. Determine your needs and preferences, and have a basic idea of your budget—then see where the process leads you. Answer each one of the following questions with your team.

YOUR PLAN CHECKLIST

- ☐ Are you currently facing any problems or challenges?
- ☐ What is the biggest problem you are trying to solve?
- ☐ How soon do you expect to move into a senior facility?
- ☐ In what geographical location do you want to live?
- ☐ What prompted you to start this search?

WHEN SENIOR HOUSING IS THE RIGHT CHOICE

- ☐ Do you have a specific housing need right now?
If so, what is it (e.g., independent, assisted, nursing, specialty)?
- ☐ Where do you currently live?
- ☐ How long will it take to sell your home and/or move?
- ☐ Who are the members of your advisory team
(e.g., spouse, children, family members, religious leader, medical team, or professionals)?
- ☐ Is your advisory team part of your planning process?
- ☐ If price were not a factor, where would you want to live?
- ☐ In which type of environment do you want to live
(e.g., private, community, social, private room, shared room, private house, or first floor)?
- ☐ What amenities would you like to have available
(e.g., entertainment, recreation, food, pool, classes, and transportation)?
- ☐ What personal care services do you need now or want
to be available (e.g., dressing, mobility help, laundry, bathing, and food)?
- ☐ What medical care services do you need now or want
to be available (e.g., treatments, specialty care, medicine, and diabetes care)?

YOUR TEAM CHECKLIST

- ☐ Do you have the following professionals on your team?
If so, list them below:
 - ☐ Attorney
 - ☐ Financial advisor
 - ☐ CPA
 - ☐ Medical doctor
 - ☐ Family members and other advisors
 - ☐ Realtor
- ☐ Are there any other needs or wants that are important to you but have not yet been mentioned?
- ☐ What is essential to the members of your advisory team?
Ask them if you have not already. For example, “I am creating a Senior Housing Plan that I expect to begin following (next month, next year, or in ten years).
What is important to you?”
- ☐ Ask your advisory team, “Is there anything else you want me to consider as I create my plan”?

YOUR CLOSEST ADVISOR CHECKLIST

- ☐ Do you have any concerns regarding my health, safety, and overall happiness?
- ☐ What challenges are you facing as my top advisor?
- ☐ Is moving in with you or a family member an option?