



My Housing Plans

Develop
Healthy
Habits

Private
Residence

Develop
Financial
Dashboard

Gather
The
Right
Team

Retirement
Community

Housing: Requirements to Age in a Private Residence

I am interested in aging in a Private Residence:

- ☐ **(If yes)** My residence will meet the following requirements:
- ☐ I will live in an Age-Friendly Home (the home and the location)
 - ☐ I have the Financial resources. I can cover the cost of living at home and pay for care as needed
 - ☐ I have localized Family/Social support (Fiduciaries are within 5 miles and I will acquire a Geriatric Care Manager)
- ☐ **(If no)** See Retirement Community Options

Notes regarding my ability to age in a Private Residence:

[illegible]

Housing: Private Residence Options

Select the options that reflect your preferences and make notes about what you would like to focus on regarding this topic.

My interest in Private Residence options:

- ☐ I am not considering a Private Residence
- ☐ I am interested in living in a Private Residence

The Private Residence housing options I'm considering are:

- ☐ N/A
- ☐ Remain in my current home
- ☐ Move to a new Age-Friendly home
- ☐ Move in with Loved Ones
- ☐ Move to a Lifestyle Community

Universal Design review for the home of my choosing: (if applicable)

- ☐ I plan to review the Universal Design for each home I'm considering

Notes regarding my Private Residence choice:

Housing: Retirement Community Options

My interest in Retirement Community options:

- ☐ I am not considering moving to a Retirement Community
- ☐ I am interested in moving to a Retirement Community

The Retirement Community options I'm considering are:

- ☐ N/A
- ☐ Independent Living
- ☐ Assisted Living
- ☐ Memory Care
- ☐ Residential Care Home (Adult Family Home)
- ☐ Skilled Nursing Facility
- ☐ Life Care Communities (CCRC)
 - ☐ I prefer a Type A - Extensive or Lifecare Contract
 - ☐ I prefer a Type B - Modified Contract
 - ☐ I prefer a Type C – Fee-for-Service Contract
 - ☐ I prefer a Type D - Rental Agreement Contract
 - ☐ I prefer a Type E - Equity Agreement Contract
- ☐ Undecided

Notes regarding my Retirement Community options: (Include areas of concern)

[illegible]