



Community Visit Checklist

Location/Proximity

- Is it convenient to shopping, medical offices, and local amenities?
- Is it close enough for visits with friends and family?
- Are there civic and religious opportunities nearby?

Services, Health Options, Amenities

- Does the community offer the services, amenities and activities you want?
- What health care services does the community offer?
- What will happen if health care needs change?
- What does the monthly service fee include?
- Are you allowed to have pets?

Is It a Good Fit?

- What is your first impression when you arrived?
- Does the staff greet you warmly, listen attentively and answer all your questions?
- Do you get a good feeling about the community?
- Are the apartment choices appealing?
- What are the three most appealing aspects of the community?

Financial/Move-In Information

- Is the community's financial structure explained to your satisfaction?
- Will you pay real estate taxes or need to carry homeowner's insurance?
- Is there an entrance fee? What does it cover?
- Is all or any portion of the entrance fee refundable?
- Is any portion of the monthly fee tax-deductible?
- Who decides when a higher level of care is warranted?
- Is there a wait list? If so, how does it work?