



“Is it Time to Move?”

Retirement Housing Planning Sheet

Weighing the pros and cons of moving from where you are now to a retirement living community can be a challenge. Use the following list to help you organize your thoughts.

Decide how each separate consideration might influence your answer to the question, “Is it time to move?” Put a check mark in the appropriate column, based on the importance of each topic.

	Big Reason to Move	Small Reason to Move	Doesn't Matter	Small Reason NOT to Move	Big Reason NOT to Move
• My current needs, and how well they are being met?					
• Staying physically active?					
• Staying connected to other people?					
• Eating right?					
• Help with personal care and health needs?					
• Being prepared, in case my needs increase?					
• The cost of moving?					
• The up-front cost and monthly fees of a new situation, after taking into account any savings or sales proceeds from my current living situation?					

	Big Reason to Move	Small Reason to Move	Doesn't Matter	Small Reason NOT to Move	Big Reason NOT to Move
<ul style="list-style-type: none"> The cost—in time, energy, and money—involved in planning and actually doing a move? 					
<ul style="list-style-type: none"> What it's costing me to maintain the home I'm in now? 					
<ul style="list-style-type: none"> The challenge it will be to leave one neighborhood or community and move to another? 					
<ul style="list-style-type: none"> Location? 					
<ul style="list-style-type: none"> Would a move allow me to move to a community I would prefer in terms of climate, amenities, etc.? 					
<ul style="list-style-type: none"> Would a move make it easier to visit family and friends and for them to visit me? 					
<ul style="list-style-type: none"> How does a move at this time fit with my personal goals and priorities? 					
<ul style="list-style-type: none"> Considering the experience of friends and relatives, does a move at this point in my life seem to make good sense? 					

Notes
