

SimplyRetirement Retirement Village Checklist



Retirement Village Living: Checklist

A list of key points that you should consider when before moving into a retirement home or village.

What you need to think about:		Questions you should ask:
The location of the village: its proximity to family, friends and facilities	<input type="checkbox"/>	Is it near to your friends and family; does it shorten travel times or allow easier access?
	<input type="checkbox"/>	Is it close to a shopping facilities, including supermarkets, hotels, clubs or cafes that you may frequent?
	<input type="checkbox"/>	Is it close to public transport such as buses and trains, and does the facility provide regular dedicated transport, and at what cost?
	<input type="checkbox"/>	Is there a hospital nearby to deal with possible medical emergencies?
The layout of village and amenities	<input type="checkbox"/>	Are all areas of the village easily accessible?
	<input type="checkbox"/>	Is the design of the units pleasing, and would you be able to live comfortably in them for a long period?
	<input type="checkbox"/>	What heating and cooling facilities in the unit and are they economical to run?
	<input type="checkbox"/>	Are there any constraints on your ability to make alterations to your accommodation, or to redecorate? How frequently are common areas repainted?
	<input type="checkbox"/>	Are there facilities such as fitness centers and pools located in the village, or nearby?
	<input type="checkbox"/>	Is there enough parking, and is it close enough to your unit to allow easy travel?
	<input type="checkbox"/>	What is security like? Is the Village well lit at night and do the units have deadlocks and monitored alarms?
	<input type="checkbox"/>	If you enjoy gardening, are there areas adjacent to your accommodation where you can cultivate or maintain your own garden?

What you need to think about:		Questions you should ask:
Visiting the Village itself.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p>Was it easy to establish contact with the manager to arrange a visit?</p> <p>When talking to the manager, did he highlight any particular benefits of this village compared to others?</p> <p>Were you given any additional written information about the village?</p> <p>Were you given a chance to inspect the units themselves, and see what they were like and whether you would be comfortable in them?</p> <p>Does the village seem to have sufficient staff to meet your requirements?</p> <p>Did the Village manager freely provide details of the contract under which you would occupy accommodation in the Village?</p> <p>When talking to the residents:</p> <p><input type="checkbox"/> Ask about life in the village, and whether there are many social gatherings for residents to interact</p> <p><input type="checkbox"/> Gently ask their opinion about their accommodation and the advantages/disadvantages of life in the village</p> <p><input type="checkbox"/> Ask about how well maintained the grounds are, and if it is always easy to get around the village</p> <p><input type="checkbox"/> Think carefully about whether you think you would enjoy living with the people you have met in the village – how good is the “fit”?</p>
Financial and Legal details – including contracts and the costs attached to living in the village.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p><input type="checkbox"/> Have a lawyer review the contract and make sure you understand all fees and how and when they apply.</p> <p><input type="checkbox"/> Instead of an upfront lump sum, is there an option to pay by the week or month?</p> <p><input type="checkbox"/> If you pay a lump sum, how much will you get back when you leave and how is this calculated? Ask for examples.</p> <p><input type="checkbox"/> What ongoing fees will you have to pay and what exactly do these fees cover?</p> <p><input type="checkbox"/> Can fees increase during the term of the contract? If so, on what basis and can you dispute them?</p>

