

## A DECISION GUIDE TO PLANNING "WHERE WILL I LIVE?"

Steven Covey, US author and educator, wrote: "Every human has four endowments: self awareness, conscience, independent will and creative imagination. These give us the ultimate human freedom — The power to choose, to respond, to change." So many changes happen as we age. It is often hard to see them as choices and opportunities rather than losses. How we prepare for them and respond to them however, makes all the difference. This decision guide is prepared to help you think through decisions you may need to make about where you live as you grow older. Some things may be out of your control, such as changes in health, finances and family. Knowing what is important to you about wherever you call "home" will help you make decisions should circumstances or choice necessitate a change in your living situation.

1. How many future moves do I foresee?

- None - I plan to stay where I am
- I plan to move to: \_\_\_\_\_  
ex: Warmer climate;  
Be near my children;  
A retirement community
- I anticipate more than one move:  
one environment in early retirement, but a  
different setting as my needs change.

2. If I stay where I am, what may I need to consider as I get older?

- Access to services, e.g., medical
- Access to social, recreational, faith-based options
- Accessibility of my home
- Ability to physically maintain my property
- Transportation
- Housekeeping
- Personal Care
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Are these options available where I live?
- Can I afford them?

3. If I cannot stay where I am, what's important to me?

- Staying near where I live now
- Transportation
- Accessibility (e.g., elevator)
- Being near medical providers
- Being close to educational & cultural venues
- Being near family
- Being with other seniors
- Being in an intergenerational setting
- Being able to have my pet with me
- Not having to cook my meals
- Help with homemaking
- Help with personal care
- Being in a community that includes my culture, language, ethnicity, sexual orientation
- Employment or volunteer opportunities
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

What options are available that meet my criteria?

What can I afford? \_\_\_\_\_

Who can help me answer these questions? \_\_\_\_\_

4. No matter where I live, I want:

- To stay socially connected to family and friends
- To have the resources to engage in things outside of home (e.g., travel, arts, entertainment)
- To have the energy to pursue social, civic, recreational, spiritual activities
- To leave assets to my children
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

5. What life changes would cause me to reconsider these choices? When should I revisit this questionnaire?

- Every \_\_\_\_\_ year(s)
- Loss of job
- Other change in financial circumstances
- Significant health changes
- Death of significant other
- Children move away
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_