

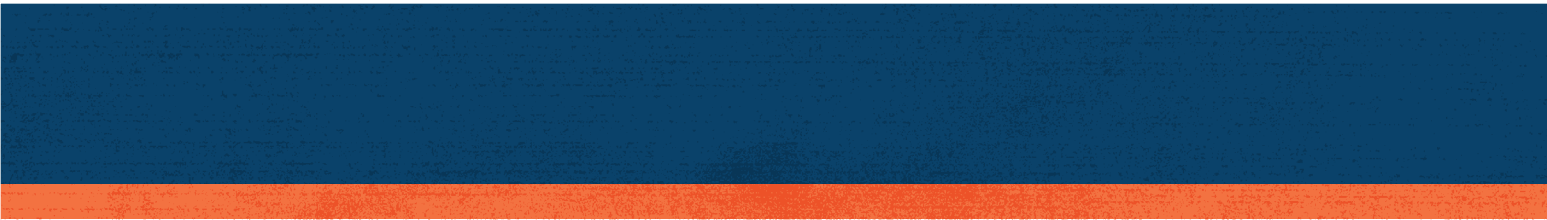
# MY LIFE, MY WAY

Before comparing your senior living options, it's important to get a clear idea of how you want to live your retirement years. What do you value most? How do you want to spend your time and energy? What makes life fulfilling for you?

This worksheet will help you articulate some of those things so that you know what to look for in a community, and you can make decisions based on your priorities.







# INTEREST ASSESSMENT

How do you spend your time now? How would you spend it if you could do things differently? This quick assessment will help you see where you have room to grow.

	Things You Currently Do	Things You Would Do if You Had the Chance
Volunteer		
Attend cultural events		
Go to the gym		
Spend time with friends		
Garden		
Learn something new		
Study group or book club		
Swim, bike, hike or golf		
Artistic expression		
Travel		
Other:		



# LOCATION, LOCATION, LOCATION

Where you live impacts how you live, so prioritize which elements of a location are most important for you.

	Very Important	Somewhat Important	Not Very Important
Stay in or near my current neighborhood			
Convenient entertainment and shopping			
Be close to cultural venues			
Live near family members			
A warm climate year-round			
Four seasons of weather			
Access to university/college classes			
City/downtown location			
Suburban neighborhood location			
Lake/mountain/rural location			
Convenient travel hub (airport, cruise port, etc.)			
Live in a small or moderate sized apartment			
Live in a large apartment or freestanding home			
Feel safe in my home and neighborhood			
Health care on site			

# WHAT MATTERS MOST

There’s more to retirement living choices than housing and amenities. Honestly rate these core values so you can make a decision that helps you live how you truly want to.

	Very Important	Somewhat Important	Not Very Important
Being part of a friendly community			
Having plenty of privacy when I want it			
Having quality health care available if I need it			
Having predictable living expenses			
Making my own choices			
Feeling true peace of mind about the future			
Protecting my estate for my loved ones			
Having purpose and fulfillment			
Taking care of my mind, body and spirit			

# IT’S MY TIME

Retirement brings opportunities for you to dive deeper into your passions and interests as well as discovering new ones. Make sure the senior living options you’re considering let you do just that.

I want convenient access to: (check all that apply)

- ☐ Art appreciation
- ☐ Board games
- ☐ Book club
- ☐ Bridge
- ☐ Cardiovascular exercise
- ☐ Computers/Internet
- ☐ Continuing education
- ☐ Cultural excursions/activities
- ☐ Dancing
- ☐ Discussion groups
- ☐ Educational lectures/presentation
- ☐ Exercise classes
- ☐ Fabric arts
- ☐ Fitness equipment
- ☐ Gardening
- ☐ Golf
- ☐ Hiking
- ☐ Library
- ☐ Music appreciation
- ☐ Music: playing an instrument
- ☐ Music: singing
- ☐ Painting
- ☐ Personal trainer
- ☐ Photography
- ☐ Poker
- ☐ Pottery
- ☐ Religious services
- ☐ Running
- ☐ Sporting events
- ☐ Swimming
- ☐ Tai Chi
- ☐ Theatre/symphony/ballet
- ☐ Travel
- ☐ Volunteer opportunities
- ☐ Walking
- ☐ Weight training
- ☐ Woodworking
- ☐ Writing
- ☐ Yoga
- ☐ Other: \_\_\_\_\_



# WHAT I WANT SOMEONE ELSE TO DO

Staying in your own home is appealing, but there are some home owner responsibilities – and expenses – that can be a burden and might be good to let go of.  
What household tasks would you like someone else to do?

I want convenient access to: (check all that apply)

- ☐ Interior maintenance
- ☐ Exterior maintenance
- ☐ Yardwork
- ☐ Snow and leaf removal
- ☐ Housekeeping
- ☐ Cooking
- ☐ Driving
- ☐ Other \_\_\_\_\_

# COMMUNITY MUST-HAVES

Not every community offers the same services or has the same approach to senior living. Some communities don’t allow pets, for example – and that’s an understandable deal breaker for some people.

Think through your priorities – what you must have to consider a senior living community (check all that apply)


- ☐ Pet-friendly
- ☐ Multiple residence types (apartments, villas, townhomes, etc.)
- ☐ On-site health center
- ☐ Housekeeping
- ☐ Home maintenance services
- ☐ Freedom to make my own schedule
- ☐ Variety of menu choices and dining venues
- ☐ Emphasis on multiple dimensions of wellness
- ☐ Activities that interest and/or challenge me
- ☐ Fitness classes at a variety of skill levels
- ☐ Eco-friendly practices
- ☐ Religious services
- ☐ Religious affiliation/ownership
- ☐ Resident voice in community activities and events
- ☐ Full continuum of care
- ☐ Outdoor spaces for gardening, walking and recreation
- ☐ Nonprofit business model
- ☐ Other\_\_\_\_\_



*Retirement living for the best years of your life!*

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