



Community & Lifestyle Fit

- Age-restricted (55+) or age-targeted?
- Social environment & activity level appropriate?.
- Walkability & neighborhood condition acceptable?
- Pet policies appropriate?
- Visited community at different times of day?

Comments:

Home Features & Layout

- Single-level living (no steps to main areas)
- Zero-step entry
- Wide doorways and hallways
- Accessible bathroom layout Walk-in shower available?
- Exterior modifications allowed by HOA?
- Lot size appropriate and manageable

Comments:

Location & Convenience

- Close to grocery stores
- Proximity to hospitals and urgent care
- Pharmacy nearby
- Nearby parks, walking trails, or fitness centers
- Drive time to friends and family acceptable
- Nearby senior centers

Comments:

Amenities & Activities

- Clubhouse or activity center
- Fitness center, pool, walking paths
- Clubs and hobby groups available
- Regular community events
- Volunteer opportunities available

Comments:

HOA & Covenants Review

- HOA fee amount and billing schedule understood
- What services the fees include
- Fencing rules acceptable
- Exterior structure rules clear (sheds, etc.)
- Parking/vehicle restrictions acceptable
- Rental or Airbnb rules understood
- Architectural review process clear

Comments:

Financial Planning

- Property taxes and available exemptions reviewed
- Utility cost estimates acceptable
- Insurance requirements understood
- Long-term affordability confirmed
- Closing costs @ moving expenses estimated

Comments:

Medical & Support Resources

- Nearby primary care providers
- Access to specialists needed
- Home health agencies nearby
- Nearby pharmacies and labs

- Senior resource agencies accessible

Comments:

Downsizing & Moving Preparation

- Home inventory completed
- Junk removal or downsizing services contacted
- Movers hired
- Pet transportation arranged
- Mail forwarding prepared

Comments:

Pre-Move Logistics

- Closing finalized
- Utilities transferred
- Voter registration updated
- Moving day checklist prepared

Comments:

Move-In & Community Orientation

- Introduced to neighbors
- Reviewed activity calendar
- Attended first community event
- Amenities and warranties confirmed

Comments:

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