Housing Options for the Next Chapter

A Planning Worksheet for Aging Parents and Their Families

CONSIDERATION	QUESTIONS TO CONSIDER	STAY IN THE CURRENT HOME AND ADAPT IT	MOVE TO A SMALLER OR SINGLE-LEVEL HOME	MOVE TO A CONDO	SENIOR LIVING COMMUNITIES	MULTI-GENERATIONAL LIVING	NOTES
SAFETY	Will this home work safely now and if mobility changes later?						
INDEPENDENCE	How much privacy and independence will this option provide?						
CARE NEEDS	Can support be added if needs increase?						
LOCATION	How close is the home to family, friends, medical care, & transit?						
COST	What are the purchase price & monthly housing costs, maintenance, HOA dues, or care costs?						
COMMUNITY	Will the person still have meaningful social connection?						
FLEXIBILITY	Would the arrangement still work if one spouse died, someone stopped driving, or health needs changed?						

Use this worksheet to explore housing options, consider changing needs, and start meaningful conversations about what comes next.

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