

Planning Your Move with Confidence

Every move is unique. Use this checklist to help you plan your next steps with clarity and confidence.

Evaluate Your Current Home Situation

- ☐ **Understand your home's market value:** A real estate agent can help you understand what your home might sell for.
- ☐ **Talk with a real estate professional:** Ask about the best time to sell, how to prepare your home, and how to time your sale with your move to a retirement living community.

Explore Retirement Living Options

- ☐ **Visit Immanuel's retirement living communities:** Take tours, meet the teams, and see what daily life is like.
- ☐ **Compare residences and features:** Look at available community options. Explore amenities and think about what fits your needs and lifestyle best.

Understand the Financial Plans

- ☐ **Learn about Entrance Fees:** There are one-time costs when you move in. They vary depending on the community you choose.
- ☐ **Ask about Traditional vs. Capital Return Plans:** These plans vary by community. A Retirement Living Consultant can explain the differences.
- ☐ **Talk about switching care levels:** Ask about the care levels available at different communities to make sure they fit your needs now and in the future.
- ☐ **Plan how to use the money from your home sale:** Think about when to sell and how that money will help with your move.
- ☐ **Ask about short-term financial help:** A financial advisor can help you explore options if your home hasn't sold yet.

Create a Timeline That Works for You

- ❑ **Decide when to sell your home:** You can sell before, during, or after your move to a retirement living community – whatever works best for you.
- ❑ **Talk with family or trusted friends:** They can help you make decisions and stay organized.
- ❑ **Get your home ready to sell:** Clean, fix small things, and make it look welcoming to potential buyers.
- ❑ **Make a moving plan:** Choose a moving date, find movers, and make a list of what to pack and when.

