

Community Checklist & Criteria			Copyright topretirements.com 2015
Criteria	Yes/No or Rating	Community A	Community B
1. What type of community are you looking for:			
55+			
Active adult			
Independent living			
CCRC			
All ages			
New Urban			
Land lease			
2. What type of housing matches your lifestyle:			
Rental			
Ownership			
Single family			
Duplex/town home			
Patio home			
Single floor living			
Apartment			
Condo			
Manufactured Home			
RV			
Other			
3. What is your ideal location:			
Northeast			

Mid-Atlantic			
Southeast			
Central			
Mountain			
Southwest			
Pacific Northwest			
List states you are most interested in here			
4. Geography and climate			
Minimum winter temperature			
Maximum summer temperature			
Rural			
Urban			
Small town			
Close to town			
Walkable/bikable			
Shops, restaurants or professional services within the community			
5. Are you looking for a particular theme to the community that you are looking for?			
Golf			
Tennis			
Artistic			
Past employment (military, arts, postal)			
Religious			
Cohousing			
Social			

Boating			
LGBT			
RV/Mobile Homes			
None			
6. What are your cost constraints (indicate your minimum expectation and maximum allowable):			
Home cost			
Monthly rental			
HOA fees/dues			
Yearly maintenance, insurance, and taxes			
Annual assessments			
Note: Fees for different communities can be very different. But you do have to consider all the factors – including value received (resale value, level and variety of amenities, taxes, etc.)			
7. What are you looking for in neighbors, and how well does the community measure up: (indicate: high, medium, low for each item. Then rate the prospective community against your preference)			
People have to be like yourself			
Welcoming and friendly			
Prefer to keep to yourself			
Actively want social interaction			
Socio-economic status			
8. What types and level of activities do you want:			

Activity level you desire (little, medium, much)			
Social director			
Clubs			
Places/opportunities to meet other people (informal or formal)			
Sports you must/want to have			
Activities you must/want to have			
Leagues to participate in			
What it is like for people who don't participate			
9. What does your ideal slate of amenities include:			
Clubhouse			
Golf			
Tennis			
Pickle ball			
Arts and crafts studio? Theatre or ballroom			
Continuing education			
Fitness Center			
Swimming pools (what type – indoor, outdoor, lap, children's, etc.)			
Other			
Other			
Other			
Other			
Note: A community might have many or few amenities. The question you have to answer is, will you use them or are you paying for something you won't use.			

10. What are the rules that might apply to you:			
Are you in general very rule abiding, neutral, or a rule breaker			
Will your pets fit under the rules			
Will you have visitors such as an adult child, much younger spouse, or grandchild living with you			
Do you want to do decorating or landscaping that might not be permitted			
Parking – how many cars and types of vehicles (RV, boat, trailer)			
11. Does the Home Owners Association (HOA, or Community Association) deserve to have you: (In most cases the answers should all be Yes. But it is important to rate the HOA against the criteria)			
Have you seen the minutes from a recent meeting			
Have you met anyone on the board			
Is the HOA run by the residents or the developer			
Do board members have staggered terms			
How long has the community been in existence			
Who owns the facilities			
What kinds of assessments are there/ have there been			
What is the level of financial reserves on hand?			
What is the delinquency rate on community dues			

