

Continuing Care Questionnaire

A list of questions to ask when you and your loved one visit a continuing care retirement community.

Note: This list of questions is not all-inclusive. These are simply basic questions that every potential resident of a continuing care retirement community should have answered. You and your loved one will probably have multiple additional questions, and you should make sure that you both are satisfied with all of the answers before your loved one signs any contracts.

Questions About The Contract

What total fees must be paid, including the entrance fee, monthly fees, processing fees, and other fees?

How often—and under what circumstances—can the monthly fee be increased?

Is the entrance fee refundable?

What are the terms of refund if your loved one decides to leave the community?

What services are included in the baseline fees?

What services cost extra?

Are credits given for meals or other services when your loved one is absent from the community (e.g. if he or she goes on an extended vacation)?

Does the facility's nursing center participate in Medicare?

Does the facility's nursing center accept Medicaid?

What types of insurance—including health insurance, long-term care insurance, renter's insurance, etc.—does the facility require residents to carry?

Under what conditions can the community terminate the agreement?

What are the residents' legal rights?

For additional tools for caregiving or aging, visit www.CaregiversLibrary.org

Questions About The Community's Finances

What is the financial condition of the community?

Who owns the community? What are the owner's financial responsibilities to the residents?

Who are the directors and managers of the community? What is their experience?

Has the community been financed?

How will the community's financial obligations be paid?
