



To Move or Not To Move?

How important are the following factors in helping you decide to move in your retirement?

Not at all important	Somewhat Important	Very Important	Most Important
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Continuity

“My retirement should have a good balance of the familiar and the new.”

Comfort

“My house will provide reasonable comfort now but what about 10 years from now?”

Climate

“I want to retire to a climate with the seasons, temperature, and humidity I prefer.”

Affordability

“Will my retirement location fit my budget?”

Relationships

“I want to retire near people who give stimulation and support.”

Medical

“I want medical facilities nearby for my particular medical needs.”

Work

“This location should give me adequate opportunity to exercise new vocations.”

Church

“My new worshiping community will be important to me in retirement.”

Culture

“This location provides sufficient cultural opportunities for me.”

Keeping Fit

“This location provides plenty of opportunities for keeping fit.”



Health Skill Questionnaire

Part 1: How well does this statement describe you or your situation?

This statement describes me	Not at all	Very little	Somewhat	Very well	Completely
I know how to calm myself in a stressful situation					
I know how to read nutrition labels to make healthy food choices					
I know how to create peaceful moments for myself throughout the day					
I know how to interpret my annual physical exam results					
I know methods that will help improve my sleep quality					
I know how to make environmentally friendly food choices					
I know how to stay active and take breaks from being sedentary at work					

Part 2: How often does this statement apply to you?

This statement applies to me	Never	Rarely	Sometimes	Often	Always
I know which CPG Medical Trust resources to use when when I'm feeling overwhelmed or stressed					
I know how my lifestyle habits affect my health					
I struggle to understand what I should and should not eat					

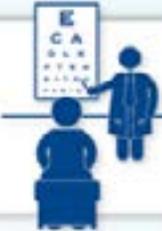


Six Steps for Staying Healthy

- 1** **Find a good balance and exercise program**
Look to build balance, strength, and flexibility. Contact your local Area Agency on Aging for referrals. Find a program you like and take a friend.

- 2** **Talk to your health care provider**
Ask for an assessment of your risk of falling. Share your history of recent falls.

- 3** **Regularly review your medications with your doctor or pharmacist**
Make sure side effects aren't increasing your risk of falling. Take medications only as prescribed.

- 4** **Get your vision and hearing checked annually and update your eyeglasses**
Your eyes and ears are key to keeping you on your feet.

- 5** **Keep your home safe**
Remove tripping hazards, increase lighting, make stairs safe, and install grab bars in key areas.

- 6** **Talk to your family members**
Enlist their support in taking simple steps to stay safe. Falls are not just a seniors' issue.




What Makes Me Happy?

Here is a list of questions to help you think about hopes and dreams for your life in retirement. What would you like to do?

What do I want to
learn how to do?

What topics do I wish to learn
more about?

What new physical experiences
do I want to have?

What new cultural experiences do
I want to have?

What do I want literally to see?

What do I want to hear?

What do I want to explore?

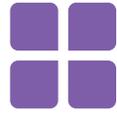
Whom do I want to meet?

What do I want to do
to make a difference?

With what kind of people do
I wish to spend more time?

Where do I want to
travel domestically?

Where do I want to
travel in the world?



What do I do all day?

3. Here is a list of activities from everyday life. Rate the list below using the following criteria:

1. **Cold:** I have little or no interest in this activity
2. **Cool:** I enjoyed doing this in the past
3. **Warm:** A new activity I've thought about doing
4. **Hot:** Something I do now that excites me

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|---|--|
| <input type="checkbox"/> Traveling to places of special interest | <input type="checkbox"/> Socializing with family/friends |
| <input type="checkbox"/> Hiking in the wilderness | <input type="checkbox"/> Exercising/sports |
| <input type="checkbox"/> Attending plays/concerts/sporting events | <input type="checkbox"/> Fixing and repairing things |
| <input type="checkbox"/> Listening to music | <input type="checkbox"/> Painting pictures |
| <input type="checkbox"/> Eating out at restaurants | <input type="checkbox"/> Visiting the library |
| <input type="checkbox"/> Working on cars or restoring old ones | <input type="checkbox"/> Teaching courses/tutoring |
| <input type="checkbox"/> Entertaining guests | <input type="checkbox"/> Reading books, magazines, newspapers |
| <input type="checkbox"/> Visiting friends | <input type="checkbox"/> Preparing and leading Bible studies |
| <input type="checkbox"/> Taking classes or courses | <input type="checkbox"/> Writing poems, stories, articles, books, etc. |
| <input type="checkbox"/> Caring for animals | <input type="checkbox"/> Cooking and baking |
| <input type="checkbox"/> Walking about | <input type="checkbox"/> Playing a musical instrument |
| <input type="checkbox"/> Engaging in genealogical pursuits | <input type="checkbox"/> Visiting in hospitals or nursing homes |
| <input type="checkbox"/> Day outings to nearby spots of interest | <input type="checkbox"/> Composing music |
| <input type="checkbox"/> Giving time to a special hobby | <input type="checkbox"/> Home decorating and design |
| <input type="checkbox"/> Going to the movies | <input type="checkbox"/> Antiquing, garage sales, flea markets |
| <input type="checkbox"/> Watching television | <input type="checkbox"/> Leading travel or tour groups |

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|---|--|
| <input type="checkbox"/> Doing crossword or other puzzles | <input type="checkbox"/> Playing card or board games |
| <input type="checkbox"/> Being a docent or museum guide | <input type="checkbox"/> Studying the stars and the night sky |
| <input type="checkbox"/> Taking a cruise or train excursion | <input type="checkbox"/> Participating in a reading or study group |
| <input type="checkbox"/> Gardening or landscaping | <input type="checkbox"/> Flying an airplane |
| <input type="checkbox"/> Participating in church activities | <input type="checkbox"/> Sewing and needlework |
| <input type="checkbox"/> Volunteering in politics or political causes | <input type="checkbox"/> Bird watching |
| <input type="checkbox"/> Ushering at concerts or sporting events | <input type="checkbox"/> Going camping |
| <input type="checkbox"/> Participating in civic clubs | <input type="checkbox"/> Participating in Elderhostel |
| <input type="checkbox"/> Learning a foreign language | <input type="checkbox"/> Boating, sailing, canoeing |
| <input type="checkbox"/> Participating in special interest groups | <input type="checkbox"/> Volunteering |
| <input type="checkbox"/> Serving on a worthy board or committee | <input type="checkbox"/> Mentoring a younger person |
| <input type="checkbox"/> Meditating and reflecting spiritually | <input type="checkbox"/> Attending sporting events |
| <input type="checkbox"/> Collecting enjoyable and valued things | <input type="checkbox"/> Dancing or taking dancing lessons |
| <input type="checkbox"/> Restoring old furniture | <input type="checkbox"/> Engaging in a second (or third!) career |
| <input type="checkbox"/> Doing arts and crafts | <input type="checkbox"/> Visiting museums |
| <input type="checkbox"/> Arranging flowers | <input type="checkbox"/> Starting your own business |

*Adapted from Ernest J. Zelinski, *The Joy of Not Working and AutumnQuest*.



Housing in Retirement Resources

Cost of Living Comparison Tool	bankrate.com/calculators/savings/moving-cost-of-living-calculator.aspx
States That Won't Tax Your Retirement Distributions	aarp.org/money/taxes/info-2020/states-that-dont-tax-retirement-distributions.html
The Real Costs of Selling Your House	aarp.org/money/budgeting-saving/info-2021/the-real-costs-of-selling-a-home.html
Best States to Retire	aarp.org/work/retirement-planning/info-09-2010/10-best-rated-states-for-retirement.html#quest1
How CCRCs Work	aarp.org/caregiving/basics/info-2017/continuing-care-retirement-communities.html
American Senior Communities – Blog	asccare.com/health-concerns-for-seniors
Technology to Support Aging in Place: Older Adult's Perspectives	ncbi.nlm.nih.gov/pmc/articles/PMC6627975
The Consumer Financial Protection Bureau	consumerfinance.gov/consumer-tools/managing-someone-elses-money
Housing Allowance	cpg.org/retired-clergy/learning/finance/taxes/clergy-housing-allowance
Visioning	cpg.org/retired-clergy/learning/health/roadmap-to-wellness/identify-your-vision/
Relocating after retirement? Smart moving tips from retirees who've done it	pods.com/blog/2020/09/retirement-relocating
8 Questions to Help You Decide Whether to Move in Retirement	forbes.com/sites/davidrae/2018/10/10/move-in-retirement/?sh=3b8ed2974ef4
The Relocation Decision	aarp.org/retirement/planning-for-retirement/info-2016/relocation-right-decision-for-retirement.html
Your Spouse Wants to Move	rebelretirement.com/your-husband-wants-to-retire-and-move-but-you-dont