



PAGE 1

Identify What Matters

Stay, downsize, or move to a continuing care community — this isn't only a housing decision. It's a decision about independence, finances, relationships, safety, and the life you want over the next 5, 10, or 20 years. Start by naming what you're comparing and what genuinely matters to you.

1 WHAT ARE YOU COMPARING?

- ☐ Age in place
- ☐ Move to a CCRC
- ☐ Downsize
- ☐ Other: _____

2 YOUR CRITERIA & WHAT THEY'RE WORTH

Rate each criterion from 1 to 5 for how important it is to you — not how well any option performs. Be honest: if everything is a 5, nothing is a priority. Add your own criteria in the blank rows.

Criterion	Importance (1–5)
Safety	
Social Connection	
Financial Sustainability	
Future Adaptability	
Independence & Control	
Quality of Life	



PAGE 2

Compare Your Options

Carry your weights over from Page 1. Score each option 1–5 on every criterion, then multiply score × weight and write that number in the shaded box. Add each shaded column for the totals.

Criteria	Weight	Age in Place		Downsize		CCRC	
		Score	× Wt.	Score	× Wt.	Score	× Wt.
Safety							
Social Connection							
Financial Sustainability							
Future Adaptability							
Independence & Control							
Quality of Life							
TOTAL							

3 WHAT DID YOU LEARN?

Which option scored highest?

What surprised you?

What assumptions do you need to validate?

What questions do you still need to answer?

WHAT IS YOUR NEXT STEP?
