



Financial Documents Checklist for Retirement Living

Whether you're nearing a move into retirement living or just like to plan ahead, gathering these documents ahead of time can help make your application process simple and stress-free. You may not need all of them, but having as much financial information ahead of time, helps you and those helping you make the most informed decisions possible.

Identification

- ☐ Government-issued photo ID
- ☐ Medical Insurance Card

Income

- ☐ Social Security award letter
- ☐ Pension statements
- ☐ Retirement account statements
- ☐ Investment statements
- ☐ Employment income
- ☐ Other recurring income

Banking

- ☐ Checking statements
- ☐ Savings statements
- ☐ Certificates of deposit

Monthly Expenses

- ☐ Mortgage/rent
- ☐ Utilities
- ☐ Insurance
- ☐ Loans
- ☐ Medical expenses

Assets

- ☐ Real Estate Information
- ☐ Life insurance
- ☐ Trust documents

Tax & Legal

- ☐ Financial Power of Attorney
- ☐ Healthcare Power of Attorney
- ☐ Living Will

Before Applying

- ☐ Completed application
- ☐ Emergency contact
- ☐ Questions for admission

Ready to Take the Next Step?

Looking for more financial information related to retirement living?

Don't forget to examine and compare rates between communities. Concordia proudly posts all of its location-based rates on its website, showcasing its affordability and flexibility.

Check out our website to learn more.

Schedule a personalized retirement living tour and discover the Concordia difference!

www.ConcordiaLM.org