



INQUIRY CONNECTION SHEET – Prospective Resident

TEAM MEMBER

DATE:

TIME:

I would be more than happy to get you the information you’re looking for. Before doing so, do you mind if I ask you a few quick questions, so I know best how to help you?

What made you decide to start a search into senior living today?

Is there anything specific you are looking for as it relates to a possible move (size, location, services)?

Friendship & events are a big part of community life, what do you like to do for fun?

What do you feel is most important to you regarding the community you may choose?

Do you currently make a monthly mortgage payment or is the home paid off?

Have you thought about your budget for a community like ours?

Do you have access to any programs that might help cover the cost (Long-term care or veterans benefits)?

Who else will support you in making this decision?

So based on what you’ve told me, it sounds like... (recap conversation)

The next step is to come in and see our apartments, meet our residents, and staff, and even taste our food if you’re up for it.

What might work best (CHOICE OF TWO), Weekday or weekend / mornings or afternoons / lunch or dinner (depending on community)?

Mailing address:

Preferred contact method

Call Email Text If text, confirm cell #