

Relocation Questions and Considerations

Two of the major considerations motivating post-retirement moves are finances and lifestyle. For many, that means they must answer serious questions about costs and, less serious but still relevant, questions about climate. Once you have answered these questions, you should have a reasonably clear idea of where you want to live when you retire.

Before using this form:

1. Download and save a copy to your computer or cloud storage.
2. Close the online version and open the copy you saved.
3. Enter your information and save the form.
4. Save again after making changes.

CONSIDER COSTS	
Item	Information
How much will my mortgage or rent be?	
Will I have to take on a mortgage?	
How much will I have to pay in maintenance fees or property tax?	
Do I know what my food costs will be?	
Do I know what the transportation costs will be?	
How much do I expect the move to cost?	
Have I checked the costs of the services I expect to use?	
How much will I have to pay for medical coverage (if I leave Canada)?	

CONSIDER CLIMATE

Consideration	Information
How high is the temperature in the summer?	
What is the average summer temperature?	
How high is the humidity?	
What is the average winter temperature?	
How low does the temperature drop?	
What is the average rainfall?	
What percentage of time will I be able to be outside?	
Will it be a healthy place for me to live?	
Will I be able to get around in the summer and winter as much as I want to?	

PLAN AHEAD

The following are suggestions to help you find the answers to some of your questions about accommodation during retirement.

Action Item	Information
Spend my vacation "living" at the new location.	
Lease my present home for a year and try out the new place.	
Check out the websites of the local Chamber of Commerce or Board of Trade for information.	
Do some of my shopping in the area (such as in clothing stores, grocery stores, and so on).	
Subscribe to a local newspaper.	

PLAN AHEAD (continued)

Action Item	Information
Talk to friends who have made similar moves.	
Inquire at my church, social or professional organizations for contacts at the new location.	

Once you are familiar with the weather patterns in the specific area or community where you would like to live and have checked out the amenities, tax structure and all of the many things that are important to you, take some time to weigh your options. Your goal is to make a carefully considered and informed decision.