

EFFECTIVE REFERRALS TO RETIREMENT LIVING

Talking about retirement living to a client

Engaging with clients who may benefit from retirement living

We have come to know our customers and their families well, and understand that raising the topic of retirement living isn't always easy—nor is assessing who would benefit always straightforward. To help you refer your clients to retirement living, we wanted to share some tips and advice on how to start the conversation.

Recognizing Fit

Who might benefit from the lifestyle in a Chartwell residence?

As we offer a variety of services for different lifestyles, you'll find we cater to a broad range of people.

INDEPENDENT SENIORS. These individuals tend to be in fairly good health and enjoy good mobility. Some challenges they may be facing are they **recently lost a spouse or no longer drive**. Their children may also be expressing worry that their parents **don't get out much anymore or feel uncomfortable in their house alone at night**. **Taking care of their home may also be becoming more onerous**. Living in a community environment may not only provide them with more opportunities to socialize, but may bring peace of mind in terms of their personal security.

SEMI-INDEPENDENT SENIORS. These individuals are likely getting to the point where some daily help is necessary for them to live well. They are likely depending more on their children for things like **grocery shopping, getting to appointments, coordinating medications and maintaining their home**. They likely **don't do a lot of cooking for themselves** anymore and make simple meals or order in—meaning they may not be getting the nutrition they need. Due to increasing mobility or health challenges, they **may need some help with elements of their daily routine** as well. The availability of delicious and nutritious meals, leisure opportunities, housekeeping and personal support are all services that can benefit this group of people.

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SENIORS WHO NEED SIGNIFICANT DAILY HELP. These individuals need **significant daily attention** to live comfortably. They are likely **managing multiple health or mobility challenges** and may need assistance with daily activities like **bathing, dressing, or medication management**. These are all support services we offer that—along with conveniences like specialized leisure programming and meals, companionship and 24-hour support—can provide the comfort and quality of life these individuals deserve.

SENIORS LIVING WITH ALZHEIMER'S AND DEMENTIA.

These individuals **may have been diagnosed with Alzheimer's** or another form of dementia or **may now be presenting with early signs** of the disease. Biggest concerns voiced by adult children would be **safety-focused**, including a parent **confusing medications, not able to carry out daily tasks**, or perhaps **getting lost** or **not remembering where they live**. These individuals would benefit from all that retirement living has to offer, including living in a secure setting where staff have dementia training and can help them lead a good day, every day.

Starting the Conversation

What's the best way to begin the conversation about retirement living?

EMPATHIZE. If your clients are expressing that their aging parent is struggling with some of the abovementioned matters, the best way to approach the conversation of retirement living is to first express empathy for their situation and remind them that they are not alone—that many adult children are going through the same thing as their parents become increasingly dependent on their help, or perhaps aren't experiencing the quality of life they deserve.

EDUCATE. This will be your opportunity to suggest that perhaps your client's parent may benefit from a *lifestyle option* like retirement living. Educate them that it's designed for seniors with varying needs and preferences. You can add that from what you're hearing about their parent's situation, it might be an option worth looking into to see if they could benefit from the lifestyle/if it could bring the whole family peace of mind.

Making the Referral

How do I direct my clients to get in touch with Chartwell?

When a client has expressed interest in learning more about Chartwell, please give them the Chartwell-branded postcard we have provided to you, which lists our preferred telephone number and website address, as well as some additional information. Please feel free to also enclose the business card(s) of any Chartwell Retirement Living Consultants you have been working with.

Find more resources on how to start the conversation on [Chartwell.com/en/professionals!](https://www.chartwell.com/en/professionals/)