

# Independent Living Leonard



**Age**  
80+

**Highest Level of Education**  
Professional degree (e.g. MD,

**Industry**  
Law & Education

**Organization Size**  
201-500 employees

## Education

Well-educated - Bachelor's in Business Administration from Indiana University, MBA from Northwestern University, Law Degree from Case Western Reserve School of Law

## Location

Cleveland West Side

## Income

Retired lawyer, part-time adjunct professor after retirement

## Religious Affiliation

Christian - values, religion plays an important part in his life

## Decision Maker

Self with help from daughter

## They Gain Information By

Word of mouth and local knowledge

## Values

Kindness & compassion, fun & enjoyment of life, faith & religion, family, relationships, traditions, material possessions, financial security.

### **Goals or Objectives**

Move into a home-like facility that fosters independence and community. Find a space close to home roots and family. Wants high-quality staff, spacious living arrangement, and interesting daily activities. Doesn't want to overpay, but wants a nice space to live. Recognizes his need for convenient medical care.

### **Biggest Challenges**

Intimidated about moving into a new, end-of-life type space and worried about getting along with others in the community. Dealing with the loss of his wife and how to navigate life without her. Trying to find a space close to family that will maintain his sense of independence while supplying meals, activities, and general care.

## Story

Leonard is an 81-year-old retired lawyer born and raised on the West Side of Cleveland. He recently lost his wife and is toying with the idea of moving to an independent living facility.

He and his wife met in Cleveland, but moved to Florida after they retired. When his wife's health began to decline, they moved back home to be closer to family. After her passing, his apartment is feeling too big, he's lonely, and tired of taking on all the day-to-day tasks alone. Leonard has several friends he's known for years, many of whom have lost spouses and transferred to independent living facilities.

The thought of moving into such a facility is exciting and intimidating for Leonard. While he could use the company now that he lives alone, it's a big decision to move to a place you'll stay for the rest of your life.

He wants a home-like environment that facilitates independence but provides meals, activities, and convenient access to medical care. He had a minor stroke last year, and now that his wife is gone he would feel safer and more comfortable having care within close reach and just others around in case something happens. Location is extremely important to him as well because he wants to stay near his family. Leonard would also like a high-quality, compassionate staff, reasonable amount of space in his apartment, and a strong sense of community where he is encouraged to interact with other residents and participate in activities. And, while he has the funds in his retirement account to afford a nice place to live, he doesn't want to break the bank or overpay for unnecessary luxuries.

Leonard has not and will not use the internet for his search, because he grew up in the area where he is looking and has friends and family there. He would like to tour only 1-2 places based on word of mouth. He is also partial to the facility where his own parents spent their senior years.

When he tours, he will not use formal channels, but will start by visiting a friend who already lives there for a meal.

His daughter is doing research as well, and once he's narrowed down his choices, she will accompany him on a tour and use the phone and in-person meetings to correspond with faculty to assist in coordinating his move. This will be a decision made almost exclusively by Leonard, but he will diligently discuss and have the support of his daughter before actually making the leap.

Leonard is a Wall Street Journal subscriber who recently unsubscribed from his local newspaper after over 50 years. He watches local news on television, and sometimes when he's in his house or car he'll also listen to the radio. He enjoys learning about current events and discussing them with friends.