



After Your Tour

Getting ready for the signing — what to bring and what to expect

Thank you for visiting Mount Vernon. If you have decided we are the right home for your loved one, the next step is the signing appointment. Gathering these items in advance is the single best thing you can do to make that appointment smooth — most delays happen simply because a document is missing. If you cannot find something on this list, please call us before the appointment rather than postponing it. We can almost always work around a gap.

BRING TO THE SIGNING

- **Photo ID:** A driver's license, state ID, or passport for the resident.
- **Social Security card:** The resident's card, or a copy. We need the number on file for billing and benefits coordination.
- **Insurance cards:** Medicare, Medicaid, any supplemental or Medicare Advantage plan, and the prescription drug card. Bring the cards themselves so we can copy both sides.
- **Power of attorney paperwork:** Financial and healthcare POA, if one is in place. Please bring the full executed document, not just the signature page — we need to verify the agent's authority.
- **Living will or advance directive (if available):** Along with a POLST or DNR order if one exists. If you do not have these yet, that is fine — we can talk through them after move-in.
- **Two months of bank statements:** All pages, most recent two months. These are required for the financial assessment and to establish eligibility for any benefits you may be pursuing.
- **A paper check:** One blank check to set up payment. Please do not pre-fill it.

HELPFUL BUT NOT REQUIRED

- **Physician contact information:** Primary care and any specialists, with phone numbers.
- **Current medication list:** Including dosages, or simply bring the pharmacy printout.
- **Pharmacy name and phone number.**

WHAT TO EXPECT AT THE APPOINTMENT

- **About 60 to 90 minutes.** Please allow time — this is not an appointment to rush.
- **Who should come:** The resident, if able, and the person holding power of attorney or handling finances.
- **What we will cover:** The residency agreement, House Rules, rates and billing, and the initial care plan.
- **You may ask questions at any point.** Nothing is signed until you are comfortable. Please ask us to slow down or explain anything again.

BEFORE MOVE-IN DAY

- **Label everything:** Clothing, glasses, dentures, hearing aids, and equipment.
- **Pack familiar comforts:** Photos, a favorite blanket or chair, and items that make the room feel like theirs.
- **Review the House Rules:** Especially the prohibited items and appliance list, so nothing has to go home again.