



downsizing made easy

5 easy steps to a successful move

**SIMPLIFYING YOUR LIFE SHOULD LEAVE
YOU OVERJOYED... NOT OVERWHELMED!**

A LITTLE ABOUT US

Residential real estate professionals



Specialist in downsizing and senior transitions real estate

Specialist in trust and probate real estate

Specialist in investor, multi unit, and non-owner occupied real estate



Downsizing Made Easy

Overview

5 Easy Steps to a Successful Move

Step 1

Creating a plan

Step 2

Communicating with family and friends

Step 3

Surrounding yourself with professionals

Step 4

Dealing with a house full of possessions

Step 5

Celebrating your new lifestyle

Frequently Asked Questions



STEP 1

CREATE A PLAN THAT
FITS YOUR LIFESTYLE
AND FUTURE NEEDS





- **What type of lifestyle do I need and/or want (now and future)?**
- **Where do I stand financially?**
- **What is necessary to prepare for a future move?**
- **What type of home or housing will best suit my/our needs?**



It can be a maze out there when it comes to researching senior living options.

your **SENIOR LIVING OPTIONS**

Independent Senior Living Communities

Assisted Senior Living Communities

Memory Care

Longterm Healthcare Community

Continuing Care Retirement Communities (CCRC)

Planned Adult Communities

Condos, Townhomes, Garden Homes, Patio Homes

Subsidized Housing

STEP 2

COMMUNICATE WITH YOUR FAMILY AND FRIENDS



Step 2

COMMUNICATE YOUR GOALS AND WISHES

Communicating your wishes is **NOT** about asking for opinions or permission!

It **IS** about establishing expectations.

You **are** asking if they want more information.

You are **not** asking if they approve or agree with your decision.





SHARE

Your preferred living arrangements and professional service providers.

CREATE

Create a written document that outlines your wishes and expectations.

INFORM

Let them know what (if any) support you will need in the near or distant future.

STEP 2

SAMPLE LETTER



Dear Family & Friends,

We would like to make everyone aware that we are considering a move. After doing some research, we have identified some communities we believe suit our needs. These communities are listed below in order of our preference:

PLAN A

#1 Community: _____

Address: _____

Floor plan / Apt. Size: _____

#2 Community: _____

Address: _____

Floor plan / Apt. Size: _____

#3 Community: _____

Address: _____

Floor plan / Apt. Size: _____

STEP 3

SURROUND YOURSELF WITH QUALIFIED PROFESSIONALS



- Real estate agent
- Move Manager
- Mover/Packer
- Estate Liquidator
- Personal Organizer
- Mortgage Lender
- Home Repair Contractor
- Pest Control Specialist
- House Cleaning Services
- Interior Decorator
- Home Inspector
- Attorney
- Financial Planner
- Insurance Agent
- Senior Living Communities
- Title/Escrow Closing Company



EVERYONE NEEDS
SUPPORT WHEN MAKING
A MOVE – NO MATTER
THEIR AGE!



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NASMM
National Association of
Senior Move Managers



STEP 4

DEALING WITH A HOUSE FULL OF POSSESSIONS

Sorting 101: To keep... or not to keep

- **Necessities** — furniture, toiletries, eating utensils, clothing, etc.
- **Family heirlooms** — jewelry, dishes, furnishings, etc.
- **Sentimental items or keepsakes** — gifts, photos, souvenirs, etc.
- **Disposables** — items with no sentimental value and not required for the new residence.
- **Charitable donations** — musical instruments, craft supplies, books, furniture, etc.
- **Trash** — if having an estate sale, let the professionals decide what is trash.
- **Valuables** - marketable items with resale value.



STEP 5

CELEBRATING YOUR
NEW LIFESTYLE

Adjusting to a New Lifestyle

BE AWARE OF YOUR FEELINGS

EVERYONE IS DIFFERENT

SOMETIMES WE NEED A LITTLE SUPPORT



Step 5

MAKING ADJUSTMENT A BIT EASIER

- Stay active or become active
- Keep in touch with family and friends
- Focus on physical activity and good nutrition
- Educate or pursue educationExplore available resources
- Take some time to explore your new lifestyle and learn to have fun again!

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SIMPLIFYING YOUR LIFE
SHOULD LEAVE YOU

overjoyed...

not overwhelmed!