

Is It Time to Rightsize Your Home and Life?

Ultimate Checklist This checklist is adapted from the "Ultimate Guide to Downsizing" PDF, tailored to help you assess if rightsizing (often referred to as downsizing in the guide) aligns with your current situation. It's organized by the guide's chapters, focusing on key questions and considerations. Answer each item with Yes, No, or Maybe. A majority of "Yes" responses may indicate it's time to proceed. This tool provides value for visitors to timetorightsize.com—use it as a self-assessment, then consult experts for next steps.

1. Understanding the Benefits of Rightsizing

(Chapter 1)

- ☐ Would reducing monthly expenses (e.g., mortgage, property taxes, utilities, maintenance) provide more financial flexibility for travel, hobbies, or security?
- ☐ Do you want less home-related work, such as repairs, yard upkeep, or cleaning unused rooms, to free up time for family, relaxation, or personal pursuits?
- ☐ Is moving closer to family, friends, healthcare, stores, or recreational activities appealing for better support and enjoyment?
- ☐ Are health or mobility concerns (e.g., stairs, hard-to-reach areas) making your current home challenging, and would a safer, more accessible space improve daily life?
- ☐ Are you ready for the emotional shift of leaving memories behind in exchange for a fresh start with more independence and less stress?

2. Planning and Decision-Making (Chapter 2)

- ☐ Have you reflected on your needs: closer to family/friends, less maintenance, accessibility features (e.g., no stairs, wider doorways), senior community with services, or proximity to healthcare/shopping/recreation?
- ☐ Have you explored housing options like smaller single-family homes, condos/townhouses, senior communities, apartments, or accessory dwelling units (ADUs) to see what fits your goals?
- ☐ Is the timing right based on market trends, your health/finances, or life events (e.g., retirement, needing support), and are you researching with a senior-move specialist?
- ☐ Have you involved family in discussions for emotional/practical support, such as helping with decisions, sorting, or finding a new home?

3. Financial Considerations and Budgeting (Chapter 3)

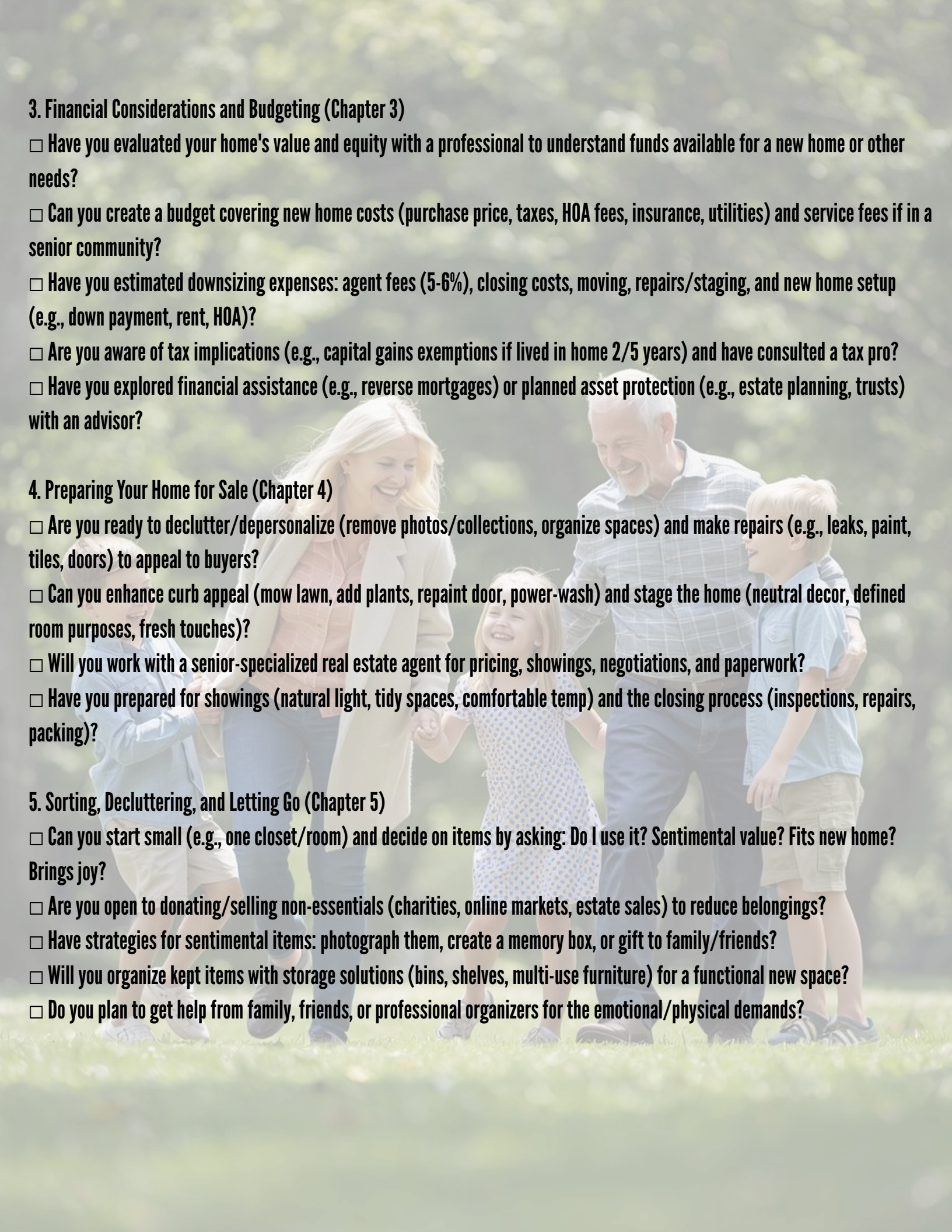
- ☐ Have you evaluated your home's value and equity with a professional to understand funds available for a new home or other needs?
- ☐ Can you create a budget covering new home costs (purchase price, taxes, HOA fees, insurance, utilities) and service fees if in a senior community?
- ☐ Have you estimated downsizing expenses: agent fees (5-6%), closing costs, moving, repairs/staging, and new home setup (e.g., down payment, rent, HOA)?
- ☐ Are you aware of tax implications (e.g., capital gains exemptions if lived in home 2/5 years) and have consulted a tax pro?
- ☐ Have you explored financial assistance (e.g., reverse mortgages) or planned asset protection (e.g., estate planning, trusts) with an advisor?

4. Preparing Your Home for Sale (Chapter 4)

- ☐ Are you ready to declutter/depersonalize (remove photos/collections, organize spaces) and make repairs (e.g., leaks, paint, tiles, doors) to appeal to buyers?
- ☐ Can you enhance curb appeal (mow lawn, add plants, repaint door, power-wash) and stage the home (neutral decor, defined room purposes, fresh touches)?
- ☐ Will you work with a senior-specialized real estate agent for pricing, showings, negotiations, and paperwork?
- ☐ Have you prepared for showings (natural light, tidy spaces, comfortable temp) and the closing process (inspections, repairs, packing)?

5. Sorting, Decluttering, and Letting Go (Chapter 5)

- ☐ Can you start small (e.g., one closet/room) and decide on items by asking: Do I use it? Sentimental value? Fits new home? Brings joy?
- ☐ Are you open to donating/selling non-essentials (charities, online markets, estate sales) to reduce belongings?
- ☐ Have strategies for sentimental items: photograph them, create a memory box, or gift to family/friends?
- ☐ Will you organize kept items with storage solutions (bins, shelves, multi-use furniture) for a functional new space?
- ☐ Do you plan to get help from family, friends, or professional organizers for the emotional/physical demands?



6. Finding the Right New Home (Chapter 6)

- ☐ Have you prioritized: location (near family/healthcare), size/layout (functional, less maintenance), accessibility (single-level, grab bars, non-slip floors), community amenities (activities, fitness, transport)?
- ☐ Explored options: smaller homes, condos, senior communities, apartments, ADUs—and toured them at different times for noise/safety feel?
- ☐ Will you use a senior real estate specialist (SRES-certified) for finding accessible homes, negotiating, and community insights?
- ☐ Does the home fit your budget (taxes, utilities, repairs, modifications) and mortgage/reverse mortgage options?

7. The Moving Process and Settling In (Chapter 7)

- ☐ Can you create a timeline: 4-6 weeks (pack non-essentials, schedule movers); 2-3 weeks (confirm details, utilities/address changes); 1 week (essentials, clean); moving day (walkthrough)?
- ☐ Decided on professional movers (senior specialists for packing/unpacking) vs. DIY (truck rental, family help) based on budget/effort?
- ☐ Have packing plans: start early, label boxes, essentials box (meds, docs), protect fragiles?
- ☐ Ready for settling: unpack essentials first, arrange for accessibility, meet neighbors, update addresses/utilities (post office, banks, insurance, etc.)?
- ☐ Prepared to celebrate: enjoy surroundings, connect socially, personalize space?

8. Emotional and Social Aspects (Chapter 8)

- ☐ Ready to cope: honor memories (photos/journal), embrace positives (less stress), be patient, seek support (family/counselor)?
- ☐ Plan to stay connected: calls/chats/visits with old friends, join community events/clubs/volunteering, use senior activities?
- ☐ Explore hobbies to meet people and build connections?
- ☐ Will you create a sense of home: decorate with familiars, establish routines, personalize (colors/art/lighting), engage neighbors?

Next Steps If You're Ready

Count your "Yes" answers. Over 70%? It's likely time—contact a real estate pro or advisor. Our Number 801-758-8595

Visit timetorightsize.com for resources, consultations, or to share your results.

Rightsizing is empowering: focus on freedom, simplicity, and joy in this new chapter.