

Rightsizing Checklist

JoAnn is a Certified Senior Real Estate Specialist (SRES) which gives you confidence she is trained and experienced to help you navigate through life's transitions. She will get your home sold and help you find your new forever home with the least amount of stress. She will research options to help develop a personal plan that works for you. And of course, as she does with all her clients, she will be involved throughout the process and long after the real estate transaction.

The following checklist is a sample of the process:

CREATE A PLAN

- Discuss with your SRES to set timelines and have SRES share marketing plan
- Decide where you want to live, and discuss with your SRES options and availability
- Discuss cost estimates and budget for the changes
- Consider the advantages of purchasing prior to selling existing home
- Decide if you plan to hire help or utilize family
- Create a binder to include brochures, floorplans, movers, charities, confirmations, appointments, and other important documents.
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DE-CLUTTER

- Consult with your SRES on what to leave in the house while on the market and what to purge in advance.
- Make decisions of what to take to your new home.
- Contact family and friends to see what items they may want. This is a great time to give sentimental items from your children's childhood back to them to share with their family
- Tackle smaller areas first. Identify areas/rooms that you seldom use
- Clean thoroughly as you go to remove a step in the moving process in the future
- Host a yard/garage/estate sale
- Organize kitchens and bathrooms.
- Organized cabinets and drawers look bigger and will show better to potential buyers
- Depending on timing, choose a different day or even week for each area.
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GET THE HOUSE ON THE MARKET

- Discuss staging and preparation with SRES to present the house to the market.
- Review marketing material with SRES
- Make a list of what you love about the house to share with potential buyers
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FINALIZE PLANS FOR THE NEW HOME

- Work with SRES for next location
- Search with SRES for smaller homes
- Search with SRES for 55+ communities
- Work with SRES to set up a SRES in another state to be closer to children and grand children
- Work with SRES to interview assisted living or senior living facilities

ORGANIZE FUTURE FLOORPLANS

- Measure the rooms in your new home
- Measure the furniture you will be taking
- Predetermine where the larger furniture will be placed
- Obtain or sketch a floorplan layout to get a vision of how the space will look. There are companies that will measure and draw up floorplans
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SCHEDULE THE MOVE

- Start packing. Since the decluttering has been done packing should be much easier. Some moving companies will do all the packing and unpacking.
- Work with movers for dates and times
- Set up utilities for new location and schedule disconnect
- Change of address for credit cards and other bills
- Make sure insurance is set up for new property and cancel scheduled for old house
- Notify the post office of change of address
- Order change of address announcement for friends and family
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MOVING DAY

- With all the proper planning things should go very smooth
- Pack a bag with all important medications, documents, and a few days of clothes and toiletries
- Let the moving company do their work.
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NEW HOME

- Unpack and organize new location
- Utilize friends and family to help with this process
- Relax and enjoy your new home
- Plan a vacation to relax even more
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