

Downsizing Checklist



WHAT FEATURES OF YOUR EXISTING HOME ARE NOT WORKING FOR YOU?

- ☐ Second Floor Primary Bedroom
- ☐ Amount of Unused Space
- ☐ Energy Inefficiency
- ☐ A Large Yard to Maintain
- ☐ Too Many Stairs
- ☐ Expensive Home Maintenance
- ☐ Not Walkable to Amenities/Restaurants

WHAT FEATURES DO YOU WISH TO HAVE IN YOUR NEW 'RIGHT SIZED' HOME?

- ☐ First Floor Primary Bedroom
- ☐ Walk-in Shower
- ☐ First Floor/ Same Floor Laundry
- ☐ Energy Efficient Home
- ☐ Natural Light
- ☐ Convenient and Accessible Storage
- ☐ Outdoor Living Space
- ☐ No Stairs
- ☐ Bonus Space for Office/Hobbies
- ☐ A Floor Plan which is Easy to Clean
- ☐ Amenities (Pool or Gym)

BUDGET CONCERNS OF YOUR EXISTING HOME

- ☐ Too Costly to Maintain
- ☐ Rising Property Taxes
- ☐ High Energy Bills
- ☐ Monthly Home Expense Bills Starting to Exceed Monthly Budget
- ☐ Upcoming Necessary Repairs (roof, hot water tank, furnace)
- ☐ Need to Budget For Renovations In Order To Age In Place (Shower accessibility)

WHAT ARE YOU WILLING TO LIVE WITHOUT?

- ☐ Large Yard
- ☐ Over-sized Kitchen
- ☐ Second-floor Living Space
- ☐ Formal Dining Room
- ☐ Excess Square Footage
- ☐ Formal Living Room
- ☐ Garage

FUTURE LIFESTYLE DESIRES

- ☐ Exercise Daily at the Local Gym
- ☐ Meet Up with Friends at the Local Coffee Shop
- ☐ Work from Home
- ☐ Travel
- ☐ Gardening
- ☐ Golf/Hiking/Outdoor Activities
- ☐ Walkability - No Need to Use My Car Daily
- ☐ Participate in Local Clubs and Groups with Likeminded People
- ☐ Lock and Leave Lifestyle
- ☐ Easy Distance to Children and Grandchildren
- ☐ Other: _____



Get Excited About Your Next Chapter

WHAT ARE YOUR HESITATIONS ABOUT DOWNSIZING?

- ☐ Decluttering
- ☐ Logistics of How to Prepare the Home for Sale and Execute a Move
- ☐ Feeling Cramped in a Smaller Space
- ☐ The Guilt of Not Leaving the Family Home to the Children
- ☐ Finding a New Home that you are Excited About
- ☐ Apprehensive About Change

WHAT IS YOUR WISH LIST FOR YOUR NEXT 5, 10, 15 YEARS?

- ☐ Freedom to Travel More
- ☐ Less Responsibility with Home Maintenance
- ☐ More Spendable Funds to Enjoy Life
- ☐ More Time with Friends and Family
- ☐ Continue an Active Lifestyle
- ☐ Ability to Age Well and Safely in Place
- ☐ Less Financial and Budgetary Concerns



Downsizing Tips

Don't Let The Logistics Deter You...
We Can Help You Succeed!

1. START THE CONVERSATION
2. BOOK A DOWNSIZING CONSULTATION
3. ENGAGE THE SEARCH FOR THE PERFECT NEW PROPERTY
4. PREPARE YOUR HOME FOR SALE
5. MAKE THE MOVE
6. ENJOY THE FREEDOM

**THE #1 THING WE HEAR
FROM OUR DOWNSIZING CLIENTS
AFTER THEY DOWNSIZE?**

**THEY WISH THEY HAD DONE IT
SOONER**

Starting to think about what downsizing may look like?

**Book a FREE Downsizing Consultation
or Sign Up for our Next FREE Workshop**



SHELLEY HIRD
DOWNSIZING SPECIALIST | REALTOR®
604.209.4855
www.thedownsizingexpert.com

 **SRES** Seniors Real Estate Specialist



OAKWYN REALTY

This communication is not intended to cause
or induce any breach of existing agency agreements

THE
**DOWNSIZING
SPECIALIST**

