READY4SENIORLIVING

The Downsizing Checklist

Your Home. Your Next Chapter. A calm, step-by-step plan for moving from the home you've loved to the lifestyle you want next.

6+ MONTHS BEFORE

Plan & talk it through

The quiet decisions that make every later step easier.

- ☐ Hold a family conversation about goals, timing, and who will help
- ☐ Confirm who can sign: trust, power of attorney, or estate documents
- ☐ Meet with your financial or tax professional about the sale
- ☐ Tour or research your next home or community and note waitlists
- ☐ Set a realistic budget for moving, repairs, and overlap costs
- ☐ Request a market analysis so you know what the home is worth today

3–6 MONTHS BEFORE

Sort, one room at a time

One room, one week, four piles: keep, gift, sell, donate.

- ☐ Get a floor plan of the new home and measure key furniture
- ☐ Start with the least sentimental rooms (garage, linen closet, guest room)
- ☐ Photograph heirlooms and let family members choose what they'd like
- ☐ Have antiques, art, and collections evaluated by a specialist
- ☐ Schedule donation pick-ups and shred old paperwork
- ☐ Gather documents: title, trust, permits, warranties, HOA records

Karen Farrell, SRES® · eXp Realty · (602) 524-8075 · karen.farrell@exprealty.com · ready4seniorliving.com
AZ Lic. SA71624000 · TX Lic. 603392-BB · Educational only; not legal, tax, or financial advice.

1–3 MONTHS BEFORE

Prepare the home & the move

Small, smart preparation — never spend before the analysis.

- ☐ Complete only the repairs your market analysis says are worth it
- ☐ Deep clean, declutter surfaces, and refresh curb appeal
- ☐ Get quotes from senior move managers or movers
- ☐ Choose a moving date that fits the community or closing timeline
- ☐ Pack a 'first week' box: medications, documents, chargers, linens
- ☐ Plan the new home's layout so the first night feels familiar

MOVING MONTH

Settle into the next chapter

The final details — and a moment to celebrate.

- ☐ Submit change of address with USPS, banks, and Social Security
- ☐ Transfer or cancel utilities, internet, and home insurance
- ☐ Update doctors, pharmacies, and prescriptions
- ☐ Do a final walk-through of every closet, cabinet, and the attic
- ☐ Hand over keys, remotes, codes, and manuals
- ☐ Unpack the familiar things first — and celebrate the new chapter

Karen Farrell, SRES® · eXp Realty · (602) 524-8075 · karen.farrell@exprealty.com · ready4seniorliving.com
AZ Lic. SA71624000 · TX Lic. 603392-BB · Educational only; not legal, tax, or financial advice.