Family Transition & Home-Sale Planning Worksheet

Four pages · Letter · Print and write
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Complete this worksheet with Mom or Dad before meeting with professionals. It is a planning tool only and is not a substitute for individualized real estate, legal, financial, tax, lending, inspection, senior-care, or other professional advice.

PART 1

Mom or Dad's Priorities — Rank 1–5

Rank each priority 1–5, where 1 is most important to Mom or Dad.

PRIORITY	RANK
Minimize disruption	
Maximize market exposure	
Minimize repairs	
Move quickly	
Have flexibility	
Reduce showings	
Coordinate another move	
Preserve time for belongings	
Prioritize estimated net proceeds	

PART 2

Property Notes

Approximate age of home: _____

Known repairs needed: _____

Major improvements made: _____

Mortgage balance (approx.): _____

HOA? Monthly fee? _____

Solar agreement? ☐ Y ☐ N

Pool? ☐ Y ☐ N

Cleanout needed? ☐ Y ☐ N

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PART 3

Decision & Authority

Confirm who owns the home and who may legally act. Where authority is unclear, confirm with a qualified Arizona attorney before documents are signed.

Owner(s) on title: _____

Trust involved? ☐ Y ☐ N ☐ Unknown

POA involved? ☐ Y ☐ N ☐ Unknown

Trustee involved? ☐ Y ☐ N ☐ Unknown

Attorney review needed? ☐ Y ☐ N ☐ Unknown

Person authorized to sign: _____

Primary family coordinator: _____

PART 4

Transition Timeline

Preferred move date: _____

Housing destination known? ☐ Y ☐ N

Must sell before moving? ☐ Y ☐ N

Can move before selling? ☐ Y ☐ N

Temporary housing available? ☐ Y ☐ N

Family travel dates: _____

Important deadlines: _____

PART 5

Belongings Plan

Sort each item into one column as you walk through the home: keep, move, gift to family, donate, sell, store, or discard.

KEEP	MOVE	FAMILY	DONATE	SELL	STORE	DISCARD

MARK EACH COLUMN AS YOU GO. A photo of each pile helps out-of-state family members follow along.

PART 6

Questions for Professionals

Note the questions to raise with an attorney, CPA, lender, financial professional, or another specialist.

PART 7

Family Meeting Notes

Record what was discussed, what was decided, and who owns the next step.

Next step: bring this worksheet to a no-pressure Senior Transition Planning Conversation at ClearlySold.com, so Mom or Dad can compare selling paths, preparation, and timing before committing to any strategy.

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