CONSUMER-CENTRIC REAL ESTATE GUIDES

Your Downsizing Transition Worksheet

Use this worksheet to organize your thinking before making decisions. The goal is not to make every decision today — it is to identify the next decisions in the right order. This worksheet is educational and does not replace individualized legal, financial, tax, lending, insurance, inspection, estate-planning or other professional advice.

1

A. Why Am I Considering a Move?

My three biggest reasons:

What I hope becomes easier:

What I do not want to give up:

2

B. Current Home

Estimated value: Mortgage balance:

Known repairs needed:

HOA (if applicable): Maintenance concerns:

Questions for real estate professional:

Questions for tax/financial professionals:

3

C. Next Home Priorities (Score 1–5)

Location	☐	Price	☐	Monthly cost	☐		
Single level	☐	Maintenance	☐	Square footage	☐		
Storage	☐	Yard	☐	Amenities	☐		
55+ community	☐	Lock-and-leave	☐	Accessibility	☐		
New construction	☐	Resale	☐				

Proximity to personally selected destinations ☐

4

D. Belongings Plan

Keep: _____ rooms/items _____

Gift: _____

Donate: _____

Sell: _____

Store: _____

Move: _____

Dispose: _____

5

E. Timing Comparison

Question	Sell First	Buy First	Move First	Coordinate
Benefits for my situation				
Challenges for my situation				
Financing/cash question				
Moving question				
Risk or uncertainty				

6

F. My Next Three Actions

1.

2.

3.

Andrew Texidor, REALTOR® · Clearly Sold · Brokered by HomeSmart

13166 W. McDowell Road, Suite B, Goodyear, AZ · AZ License # SA524400000 · ClearlySold.com

This worksheet is for general educational purposes only and is not legal, financial, tax, lending, insurance, inspection, or estate-planning advice — please consult qualified professionals for guidance specific to your circumstances. Equal Housing Opportunity. Not a solicitation if your property is listed. Clearly Sold is a team of HomeSmart.