Printable Family Planning Checklist

A single, organized reference to guide your family through every stage of the transition — print it, share it, and check items off as you go.

FAMILY _____ DATE _____ ADVISOR _____

LEGAL & FINANCIAL

- [ ] Power of attorney in place
- [ ] Will and trust reviewed
- [ ] Home equity/mortgage understood
- [ ] Tax implications discussed
- [ ] Financial advisor consulted

NOTES

HOME & BELONGINGS

- [ ] Home condition assessed
- [ ] Repair decisions made
- [ ] Belongings sorted by category
- [ ] Estate sale or donation arranged
- [ ] Cleaning and staging planned

NOTES

FAMILY & TRANSITION

- [ ] Family meeting held
- [ ] Roles assigned
- [ ] Selling method chosen
- [ ] Timeline established
- [ ] New living situation confirmed

NOTES

You don't need to check every box before moving forward. Even a few completed items gives your family a clearer picture and reduces stress along the way.
Bring this page to your next family conversation — and to your Clearly Sold strategy consultation. ClearlySold.com

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Family Meeting Notes

Write down what was said, what was decided, and who owns the next step. Keep it with the checklist so everyone works from the same page.

WHO WAS PART OF THE CONVERSATION names and relationship

WHAT MATTERS MOST TO MOM OR DAD their words, not ours

DECISIONS WE MADE TODAY what we agreed to, and what we set aside

NEXT STEPS one action per line, with an owner

ACTION	OWNER	BY WHEN

BRING THIS TO YOUR CONSULTATION

No pressure, no obligation — just a conversation about your family's situation and the options in front of you. Clearly Sold, brokered by HomeSmart. ClearlySold.com

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