

Your Downsizing Decision and Planning Guide

A neutral way to explore what may fit your life now and in the future

Who this is for	Homeowners considering downsizing, rightsizing or another housing change, including people planning years ahead.
When it is used	Before a decision to sell, or during an early options conversation.
What to do	Complete only the sections that help. If a consultation questionnaire already records an answer, review it instead of writing it again.
What happens next	Identify missing information, choose up to three small next steps and pause whenever more time or professional advice is needed.

NO DECISION IS REQUIRED TODAY

Exploring options is not the same as committing to sell. Staying may be reasonable. Moving may be reasonable. Rightsizing means finding a home and lifestyle that better fit your current and future priorities. This guide helps organize your thoughts before a major decision.

1. What is prompting the conversation?

Select all that apply. Skip this section if your Seller or Buy-and-Sell Consultation Questionnaire already records the answer.

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| ☐ The home requires more maintenance than I want | ☐ I want more freedom to travel |
| ☐ I use only part of the home | ☐ I am planning ahead |
| ☐ Stairs or the layout are less convenient | ☐ A family change has occurred |
| ☐ I want to be closer to people, services or activities | ☐ I am curious about my options |
| ☐ I want a different community or lifestyle | ☐ I am not sure yet |
| ☐ Housing costs or responsibilities have changed | ☐ Other - note below |

Other or notes

2. What is still working well?

Select any part of the current home or lifestyle that you would want to protect in a future plan.

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| ☐ Location | ☐ Hobbies |
| ☐ Neighbours | ☐ Family gatherings |
| ☐ Familiarity | ☐ Transportation |
| ☐ Space | ☐ Community |
| ☐ Yard | ☐ Financial predictability |
| ☐ Privacy | ☐ Emotional connection |
| ☐ Storage | ☐ Other |

What matters most about staying?

3. What is becoming less suitable?

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| ☐ Maintenance | ☐ Feeling isolated |
| ☐ Repairs | ☐ Cost |
| ☐ Yard care | ☐ Time demands |
| ☐ Stairs | ☐ Safety question for a qualified professional |
| ☐ Layout | ☐ Belongings and storage |
| ☐ Unused rooms | ☐ Uncertainty about future needs |
| ☐ Distance from services | ☐ Other |
| ☐ Transportation | |

Which issue has the greatest effect on daily life or future planning?

4. What would a better fit look like?

Select all that matter. A strata is an ownership form with common property and bylaws. Budget, accessibility and other specialist questions must be confirmed by the appropriate professional.

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| ☐ Preferred community | ☐ Accessibility or adaptability |
| ☐ Close to family or friends | ☐ Pet needs |
| ☐ Walkability | ☐ Strata or non-strata preference |
| ☐ Transit | ☐ Lower maintenance |
| ☐ Parking | ☐ Social opportunities |
| ☐ Outdoor space | ☐ Privacy |
| ☐ Bedroom count | ☐ Travel convenience |
| ☐ Guest space | ☐ Easy to secure and leave while travelling |
| ☐ Hobby space | ☐ Budget questions to explore |
| ☐ Storage | ☐ Other |

My most important future-home priorities

5. Housing options to explore

These are categories to investigate, not recommendations or rankings. Select more than one if useful.

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|---|---|
| ☐ Remain in the current home | ☐ Renting |
| ☐ Modify or adapt the current home | ☐ Closer to family |
| ☐ Smaller detached home | ☐ Another community |
| ☐ Townhome | ☐ Supportive or service-oriented housing, if personally relevant |
| ☐ Condominium | ☐ A staged or future move |

6. Stay-versus-move reflection

Reasons staying may work well

Reasons moving may work well

What information is still missing?

Which concerns could potentially be solved without moving?

Which concerns would remain after changes to the current home?

What would make the decision feel more confident?

Who should be part of the discussion?

Is there a deadline, or is there time to explore?

7. The belongings roadblock

You do not need to clear the whole home before exploring real estate options. Home decisions and belongings decisions can move forward in parallel. Start with one low-emotion task using Too Much Stuff? Start Here. Rob can identify service categories; organizers, movers, auction services, donation organizations and removal companies provide their own specialized services.

8. People who may help

The right professional depends on the question. Selecting a category here does not authorize a referral or share your information.

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| ☐ Rob - real estate guidance | ☐ Storage provider |
| ☐ Lawyer or notary | ☐ Auction or estate-sale professional |
| ☐ Mortgage professional | ☐ Specialized-belongings appraiser |
| ☐ Accountant or tax professional | ☐ Donation or recycling service |
| ☐ Financial planner | ☐ Contractor or tradesperson |
| ☐ Professional organizer | ☐ Insurer |
| ☐ Downsizing or move manager | ☐ Family member or trusted supporter |
| ☐ Mover | |

9. Family and decision-making

Use only the prompts that fit. Questions about legal authority, capacity, powers of attorney or estates belong with a lawyer or notary.

Who should be informed, and who is helping?

Who makes the final decision? What help is welcome - and not welcome?

Are there belongings to ask family about, privacy concerns or disagreement to address before setting a timeline?

10. A phased planning approach

Phase 1: Explore

Clarify goals; learn about the current home's value and marketability; explore housing categories; identify professional questions; begin one small belongings task.

Phase 2: Prepare

Decide whether moving remains worth considering; identify a general timeline; plan paperwork and home preparation; select support providers; continue gradual sorting.

Phase 3: Act

Confirm the real estate plan and professional advice; prepare the current home; coordinate purchase, sale, moving and possession; use the Completion and Moving Guide.

PAUSE WHEN YOU NEED TO

You may pause between phases. A useful next step can be gathering information, not making a commitment.

11. My next three steps

1. One question I need answered

2. One small home or belongings task

3. One person or professional I should speak with

Target date

Notes

Rob's next action

Client's next action

EXPLORE YOUR OPTIONS

No immediate decision is required. You remain in control of the timing and decisions. Rob's role is to provide clear real estate guidance and help coordinate appropriate next steps.