ONE OAK REALTY CORP.

PRINTABLE PLANNING WORKBOOK

A calmer checklist for *downsizing & selling.*

Use the parts that fit your situation. Leave the rest for later. This checklist is a planning aid—not a test, deadline, or commitment to list your home.

You remain in control. Gathering information does not obligate you to sell. Compare staying, modifying the home, moving smaller, renting, buying, and 55+ community options before deciding.

1 Begin with the decision

Write down what is working, what is difficult, and what you want the next chapter to feel like.

- ☐ I listed what I still enjoy about this home.
- ☐ I listed what has become tiring, unsafe, lonely, or expensive.
- ☐ I compared selling with staying and making the home easier.
- ☐ I identified who I want involved in the conversation.
- ☐ I decided how I prefer to receive updates: phone, email, text, print, or scheduled meetings.
- ☐ I gave myself permission to pause if I am not ready.

My priorities and questions

2 Understand the destination first

Before sorting the whole house, learn what the next home, rental, or community would require.

- [ ] I compared entrances, stairs, bathrooms, parking, and everyday accessibility.
- [ ] I considered transportation, healthcare access, family, friends, and activities.
- [ ] I measured the rooms and doorways that matter most.
- [ ] I reviewed total monthly costs, not only the sale price or rent.
- [ ] I confirmed pet, guest, storage, parking, and modification rules.
- [ ] I considered whether the new home could still fit if my needs change.

Possible destination

Preferred moving window

3 Make a gentle belongings plan

Use short sessions. Start with easy categories before photographs, paperwork, heirlooms, or other emotional decisions.

- [ ] I started with duplicates, expired items, or a low-emotion area.
- [ ] I created four destinations: keep, give to a named person, sell or donate, and discard.
- [ ] I photographed meaningful rooms, collections, gardens, or bulky heirlooms.
- [ ] I saved donation receipts and sale records for a tax professional.
- [ ] I limited sorting sessions to an amount of time that protects my energy.
- [ ] I chose furniture using the new home's actual measurements.
- [ ] I arranged an independent appraisal before selling or donating anything that may be valuable.
- [ ] If I need storage, I made an inventory and chose a date to review it.

People, donations, appraisals, or items that need special care

4 Prepare the home for information—not perfection

Ask which items are important, which can be disclosed or priced around, and which do not need attention.

- [ ] I gathered warranties, permits, surveys, repair records, and major-system information.
- [ ] I asked whether a pre-listing inspection would help uncover surprises.
- [ ] I requested written estimates before agreeing to repairs.
- [ ] I made a priority list instead of trying to update everything.
- [ ] I planned cleaning, lighting, simple curb appeal, and manageable decluttering.
- [ ] I kept needed furniture, mobility equipment, medications, and routines accessible.

Repair, inspection, disclosure, or preparation questions

5 Understand the money and paperwork

Ask for written explanations and bring legal, tax, financial, insurance, or estate questions to the appropriate qualified professional.

- [ ] I requested a written market analysis with comparable properties.
- [ ] I requested an estimated seller net sheet that clearly labels assumptions and likely costs.
- [ ] I compared the next home's complete monthly costs with my current costs.
- [ ] I asked an attorney about title, trusts, estate documents, liens, or powers of attorney when applicable.
- [ ] I asked a CPA or tax professional about tax consequences and records.
- [ ] I asked qualified professionals about insurance, benefits, loans, or reverse-mortgage questions when applicable.
- [ ] I know I can ask questions and request time before signing.

Questions for the Realtor, attorney, CPA, financial professional, insurer, or title professional

6 Keep showings, offers, and closing safer

Protect privacy, daily routines, valuables, and funds throughout the transaction.

- [ ] I agreed on showing notice, timing, supervision, rest periods, pets, caregivers, and accessibility needs.
- [ ] I secured jewelry, firearms, medications, identity papers, passwords, and financial records.
- [ ] I know that the highest price may not be the simplest offer.
- [ ] I will compare financing, inspection, appraisal, contingencies, credits, closing, and possession.
- [ ] I will independently verify wire instructions using a trusted phone number.
- [ ] I will not act on unexpected payment requests or changed wiring instructions received only by email.

Showing, offer, closing, or fraud-prevention questions

7 Plan the move and first night

Keep essential items with you and coordinate the transition before the moving truck arrives.

- [ ] I requested written mover or senior move-manager estimates and checked experience, insurance, contracts, and references.
- [ ] I confirmed who will pack, move, unpack, remove donations, and dispose of unwanted items.
- [ ] I planned utilities, mail, address changes, prescriptions, appointments, keys, and pet care.
- [ ] I made an inventory and photographed valuable or fragile items.
- [ ] I packed a bag that stays with me instead of entering the moving truck.
- [ ] My personal bag includes medications, documents, keys, glasses, hearing devices, chargers, toiletries, clothes, water, snacks, and emergency contacts.

Moving-day contacts, schedule, and first-night reminders

8 Create your support list

Write down the people responsible for each part of the transition so one person does not carry everything.

Family or trusted supporter

Attorney

CPA or tax professional

Title or closing professional

Mover or senior move manager

Other important contact

The one next step I am comfortable taking

A CONVERSATION BEFORE A COMMITMENT

Talk through your next step.

You do not have to be ready to list. Mary Gustafson and Michael “Mike” Chiorando can help you compare your housing choices, organize questions, and identify the next practical step.

Free home market analysis. Ask Mary Gustafson or Michael “Mike” Chiorando for a complimentary report based on recent comparable home sales. Use it as a starting point for portfolio planning or a conversation with your accountant or estate adviser. It is not an appraisal; ask your adviser what type of valuation is required.

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Helpful source material

This checklist is informed by established consumer and senior-transition resources. Links open in a new tab; printed URLs appear below each source title.

- AARP: One-Year Countdown Checklist to Selling Your Home
  https://www.aarp.org/home-living/home-sale-checklist/
- National Association of REALTORS®: Before Putting a Home Up for Sale
  https://www.nar.realtor/news/tools/client-education/handouts-for-sellers/before-putting-a-home-up-for-sale
- National Association of REALTORS®: Seller Showing Checklist
  https://www.nar.realtor/the-facts/consumer-guide-seller-checklist-15-things-to-do-before-every-showing
- National Association of Specialty & Senior Move Managers
  https://www.nasmm.org/
- National Association of REALTORS®: Wire-Fraud Prevention
  https://www.nar.realtor/wire-fraud

Notes from my resources

Use this space for questions, names, or follow-up information you want to keep with this checklist.