



Downsize The Easy Way



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SELECT REAL ESTATE



Ready to retire and downsize your home? Here are some ways to prepare for the move and make the transition easier.

1. **Research your ideal new home.** Look into condominiums and senior communities to see if they have benefits, you'll enjoy. Select an easily accessible home with added features like grab bars or non-slip floors to ensure your future comfort.
2. **Fit your furniture to the space.** Chances are you have some larger pieces of furniture that won't fit in your new home. Keep only essential furniture in good condition.
3. **Clear out your garage.** If you're moving to a senior community or other organized community, you may not have to worry about yard work. Get rid of tools and equipment you won't need in your new home.
4. **Recycle your kitchenware.** Donate or dispose of any extra pots, pans or other large items in your kitchen.
5. **Distribute sentimental items.** Collectibles, art projects, report cards and baby clothes are full of wonderful memories, but you may not have room for them in your new home. Let your family take home sentimental items they want and let go of the rest.
6. **Give the kids their stuff.** If you have grown children, have them claim their belongings that take up space in your home.
7. **Hold a garage sale.** If many items you don't need are in good condition, a garage sale is an easy way to collect some cash. Sell what you can and donate the items that remain.
8. **Make downsizing an event.** Downsizing can be difficult - you are saying goodbye to a beloved home. Invite your family, friends and neighbors to come help you with the process. Have snacks or an easy dinner to make it more fun. Giving your home a proper farewell may help you get ready to move on.

Give me a call today for your buying and selling needs!

MARGIE MCINTYRE
YOUR LIFESTYLE . MY EXPERIENCE

The Upside to Downsizing



- *Lower mortgage payments*
- *Less costly utility bills*
- *Less to clean*
- *Easier to maintain*
- *Less yard maintenance*

Downsizing occurs for different reasons

- Your current home is too large or the stairs are challenging
- Your children left home and the house feels empty
- Daily upkeep and routine maintenance are more than you can easily or desire to handle
- Retirement requires you to cut back on housing expenditures
- You want to live closer to your family members

Moving to a smaller home opens up possibilities and gives you a feeling of freedom

- Money can be saved toward your retirement, upgrade to a smaller home with better features or fund your world travels
- Downsizing simplifies your life, frees you from the cost, time and commitment of maintaining a home that is now too large
- You can unlock your home equity, buy a new home and even retire your mortgage

Reasons to sell in this market

Our area is attracting new companies. Our city is flooded with residents filling those jobs. This window of opportunity means it is a great time to put your home on the market.

- It is a Seller's market - the market is low on inventory
- Mortgage rates are at a record low
- Buyer's needs have changed. Many are working from home and need a larger space with a home office. Your current home may be too large for you and perfect for someone else

This may be the most important move of your life and it requires time, patience, attention to details and guidance. This guide is designed to provide you with a plan and outline to get you where you want to go.

Ask Yourself When Considering Downsizing

- Are you open to a townhouse, condo, apartment or smaller home?
- Would an Active Adult community with resort style living be a good fit for you?
- Location, location, location - what do you want to be close to - medical facilities, shopping, family or friends?
- Size - what square footage will you need and be comfortable with in the future?
- Is a view important to you?
- Are you considering a single level home or one with a master on the main?
- Will you require kitchen shelves and cabinets at a certain level?
- Will stairs, tubs or doorway size need to be a consideration?
- Do you need easy access to the entry of the home?
- Will the new home save you money or will utility bills, HOAs, property taxes or maintenance add an additional cost?
- How much upkeep do you want? Do you just want to be able to lock and leave?



*Explore the market you are moving to.
Remember, you will need enough cash available to make an offer simultaneously on the property you purchase.*

Move Forward

Now that you made the big decision to downsize there is lots of work to do. This guide was compiled to help you sort through your important documents, declutter and coordinate your move. The less you worry about the actual move yourself the more you can focus on your new lifestyle.

Research today's real estate market

Hire a real estate agent and get a Comprehensive Market Analysis on the value of your current home. Be crystal clear as to your purchasing power.

Consult a financial advisor

Financial advisors, lenders, CPAs and attorneys help you gain insight as to your finances. Designate a friend or family member as an authorized user on your important accounts or property access codes in case needed

Medical care

If you stay in the same area, you simply need to notify your medical team about your change of address. If relocating out of the area research local providers in your health care network in your new zip code.

Check to see if these new medical providers accept new patients and schedule an appointment for after you are settled in your new home. Have your medical records transferred to your new doctor, dentist for future reference. Have your prescriptions transferred to the pharmacy you will be using.

Remember to do the same for your 4-legged family members as well.

*Stay Positive!
Get excited about
a simpler life
in a new place with
less clutter.*



Simplify Your Life

Once you decide that you are downsizing contact a REALTOR® experienced in working with over 50+ homeowners. This agent will know what key characteristics to look for in your new home. These specialists are educated to guide a seller and buyer through a transaction seamlessly and hassle-free.

Consider searching for a Seniors Real Estate Specialist® designee. This is a real estate professional that will respond to your specific real estate needs.

***Margie McIntyre is a trained
Seniors Real Estate Specialist®
(SRES®)***

What is an SRES®? A Seniors Real Estate Specialist® (SRES®) is a REALTOR® who is uniquely qualified to assist seniors in housing sales and purchases. The SRES® designation is awarded only to REALTORS® who successfully complete a series of educational courses on how to help seniors and their families with later-in-life real estate transactions. They draw upon the expertise of a network of senior specialists, such as estate planners, CPAs and eldercare lawyers and are familiar with local community resources and services. Their mission is to help seniors and their families navigate the maze of financial, legal and emotional issues that accompany the sale of the home.

Hire a Seniors Real Estate Specialist®

Consider specifically choosing an agent who has a Seniors Real Estate Specialist® (SRES®) designation.

Margie McIntyre can assist you in customizing a downsizing plan for you. After creating your wish list, she will keep you informed of homes on the market that meet your needs. She can also list your current home or refer you to an agent in the area you choose to move to.



Start With These Steps

The prospect of downsizing can overwhelm you physically and mentally. Don't overdo it. Set aside two to three hours daily to declutter and organize. Fill the rest of the day with activities you enjoy. This is a big undertaking. Stick to your plan and stay on track. Once you get into a rhythm you will master it.

If your current home is 4,000 square feet and you downsize to a 2000 square foot home, you need to plan on rehoming about 50% of your interior possessions and to part with between 75% and 90% of your exterior possessions, depending upon the balcony/patio/garage situation at your new place.

Downsize one room at a time

Start with easy, less cluttered rooms. Tackle the rooms you will not have in your new home first. If your new home does not have an office, everything in that room needs to be donated, stored, given away or sold.

Consider renting a storage unit

An air-conditioned storage unit with ample space to store items gives you the option to keep valuable and nostalgic things without taking up room in your new home. The unit should be large enough for all your things, but not so large that you are paying for unnecessary space.

Visualize yourself, your furniture and belongings in the new location. Consider the layout of your new home.

- Will your current furniture fit into your new home? Be realistic. Treat yourself to some new furniture designed for smaller rooms
- Eliminate clutter. Take photos of collectibles and turn them into a photo album to display and enjoy on a coffee table. Be creative and turn old photos into a collage to hang on the wall.
- Create a video tour of your current home house or an album of moving images to preserve your memories
- Move items to be disposed to an area for trash collection

What should I do with items I no longer need?

- Categorize and labels items to keep, donate, sell, dispose of or store
- Books can be taken to a used bookstore, library or senior center
- Ask family, friends, neighbors if they would like any of the items
- Donate to a local shelter or thrift store
- Estate or yard/garage sale
- Sell thru social media sites (such as Facebook, Marketplace, Craigs List, eBay)
- Trash or recycle anything broken or unusable
- Consignment Shops
- Pawn shops

- *Allow more time than you think is needed*
- *Start small in easy areas*
- *Work at a steady pace*

Start With These Steps

Checklist of items to sort through. Decide what you want to keep, store or discard. Keep only the basics. Eliminate duplicates.

- Kitchen, Glassware
- Cookbooks
- Kitchen gadgets and appliances
- Pots, pans, Tupperware, mixing bowls
- Water pitchers
- Coffee mugs
- Glass jars
- Magazines, newspapers, books, manuals
- Expired medicines
- Cosmetics and toiletries
- Hair accessories
- Personal appliances
- Photos
- Photo supplies
- Sewing
- Scrapbooking and craft supplies
- CDs/DVDs/VHS tapes
- Wall Decorations
- Candles, candle holders
- Figurines
- Vases, crystal, china
- Audio visual components and cables
- Computer equipment and cables
- Old cellphones and phones
- Furniture
- Video games and accessories
- Clothing items, accessories, handbags, footwear
- Hangers
- Underwear, socks, sleepwear
- Jewelry
- Linens, duvets, comforters, blankets,
- Towels, pillows
- Televisions
- Office supplies, rubber bands, magnets
- Cleaning supplies
- Old batteries
- Tools and hardware
- Cooler
- Coupons
- Board games, puzzles, decks of cards
- Unused gifts
- Children's artwork
- Suitcases
- Wrapping paper
- Plastic bags
- Party supplies
- Seasonal decorations
- Sporting goods/memorabilia
- Automotive supplies
- Scraps of lumber
- Brooms
- Rakes
- Shovels, garden tools
- Plant containers, pots

Touch every single item you own. Look at it and ask yourself..

- *Is this item a necessity?*
- *Have I used this item in the past year?*
- *Do I love this item?*
- *Is there space for this in my new home?*

*If your answer is yes to any of these questions - keep the item
If your answer is no - discard it*

Downsizing Checklist

Organize yourself

- Obtain moving company estimates
- Schedule a moving date with moving companies, truck rentals or moving services
- Take measurements of your new home

Decide large items to keep

- Washer/Dryer
- Refrigerator
- Microwave
- Dining Room Set
- Bedroom furniture
- Couches
- Tables

Sort items you no longer want into piles

Tag with different color labels

- Give to family and friends
- Donate to a charity. Schedule a pick-up
- Select what you want to be sold and how-consignment, online, estate sale, yard sale
- Arrange for junk removal for unwanted items

Save the following

Paperwork checklist

- Names, contact information, and brief descriptions of your doctors, attorneys, accountants, bankers, brokers and insurance agents
- Savings accounts, pension or retirement plan income; CDs; stocks; bonds; insurance policies; titles for cars, boats, homes, etc.
- Photos or videos of personal items for insurance purposes
- Personal liabilities list
- List of account numbers of checking, savings accounts, AARP and credit cards

Which originals to keep

- Birth and death certificates
- Medicare cards & Driver's license
- Tax records (for FIVE years)
- Pension documents
- ID cards and passports
- Marriage license and Business license
- Any insurance policy (good to keep even if they have a digital copy in case problems come up)
- Trusts, wills, living wills and any codicils, durable power of attorney and advance directives
- Vehicle titles and loan documents
- House deeds and mortgage document

- *Place vital information in a safe deposit box or fireproof safe.*
- *Scan vital documents and store online.*
- *Share this information and how to access it with someone you trust.*

Checklist for Success

Update everyone you do business with your new address

- Financial Institutions
- Credit reporting agencies
- Banks and Credit Unions
- Brokerage accounts
- Insurance companies
- Lenders

Government agencies

- IRS
- Department of Motor Vehicles
- Business license office (for small or home businesses)
- Postal Service

Memberships

- Professional associations
- Magazines, newspapers, subscriptions
- Organizations
- Places of Worship
- Health, tennis, social and country clubs

Service providers

- Accountant
- Legal Team
- Cleaning service and home maintenance
- Medical providers including Dentists and Veterinarians

Notify all utilities (water, gas, electric, security monitoring, garbage, internet, landline) of your move so you can coordinate a connect and disconnect service to meet your timetable



Make a Move You'll Love!



Pre-moving day checklist

- Get a written contract from the moving company and idea of coverage for lost or damaged items
- Have a moving envelope for keys, contacts, estimates, receipts and an inventory of what you take
- Confirm your time and final details with your mover, truck rental or moving services
- Get a firm time for the moving company's arrival at both the old and new residences
- Schedule utility disconnects and reconnects
- Schedule cleaning services for the home you are leaving
- Check payment options: credit card or check
- Pack similar items from the same area together

- Ask for help with packing: family members, friends, a moving company
- Acquire boxes, specialized containers and masking tape
- Get markers and labels and pre-label each box with the name of the room/area they will go in your new home
- Pack an "open first" box, which includes toiletries, nightclothes, change of clothes, toilet paper, towel, tape, scissors and a little cash for the unexpected
- Keep important items with you during the move: (new lease or contract, keys, glasses, medicines, legal documents, checkbook, cell phone. Valuables need to be in a safe-deposit box unless worn on a regular basis)
- Save medications and toiletries for last

Helpful Hints

- Measure your new living space
- Decide which large furniture items to keep
- Schedule a trash and donation pick up
- Set aside time daily to slowly go thru your belongings
- Hire a cleaning service to come in before the walk through on your current home

Relax You Are On Your Way

Moving Day has arrived!

- Assign someone to meet the movers at your new home with a key
- Clean out your pantry and deep freeze
- Make sure all boxes are clearly labeled
- If a pet's making the move with you pack their food, bowls, beds and medications
- Pack a suitcase with your own clothes, medicines and personal items
- Pack valuables yourself
- Recognize this is a process and prepare to spend a few days unpacking and organizing
- Have light cleaning supplies ready for your new home

Settling in

- Once you are in your new home unpack the essential items first: kitchenware, towels, clothing, television and computer
- Organize linen closets, kitchen cabinets and bathrooms
- Make a grocery store run to stock your fridge and pantry.

As the hustle and bustle of the move wears off emotions can run high. Focus on all the positives that made you decide to make this move and allow yourself time to



adjust. Relax and enjoy!

I Can Help You Downsize!

Let's talk by phone, Zoom meeting or in person. This is the time for me to listen to your plans, goals and timeline. Let's discuss where you are planning on moving next. From here we can create a unique action plan geared to your personal needs to help you achieve your goals. There is no charge or obligation for this confidential consultation.

As your *REALTOR*® it is my job to:

- market your home to prospective buyers with signs, MLS, Internet exposure and on my personal website and the Nevada Home Connections website
- price your home to sell based on an analysis of the local market and comparable properties
- help you understand the legal aspects and paperwork so you don't have to worry
- communicate on your behalf to make sure you get the most out of your home sale
- assist you in finding a new home or refer you to an agent in the area you are relocating to
- negotiate on your behalf to help you sell your current home for maximum return

Contact me when you are ready to talk.

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