



# Downsizing Success Checklist

Get this free printable checklist and stay on track with every step of your downsizing journey.

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# Your Complete Downsizing Roadmap

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## Run the Numbers

- Get a professional home valuation
- Request a full **net proceeds analysis** (include realtor fees, taxes, staging, repairs)
- Consult with a tax advisor on capital gains exposure
- Get pre-approved for your next home before listing

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## Declutter With a Plan

- Create a 6-month calendar (one room per week)
- Sort into *Keep, Sell, Donate* piles
- Host a "family memory day" to handle sentimental items
- Book estate sale/donation pickups early
- Price professional organizer support if needed

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## Prep Your Current Home

- Knock out minor repairs before inspection
- Stage key living spaces (first impressions sell)
- Order professional photography
- Review showing instructions with your Realtor

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## Shop Smart for Your Next Home

- Define "must-haves" (location, lifestyle, budget)
- Research 55+ communities, low-maintenance options, or condos
- Compare HOA fees, property taxes, and insurance

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## Smooth Transition Planning

- Align closing dates to avoid double moves
- Book movers or portable storage early
- Update utilities, address changes, and insurance
- Pack a "first week" essentials box