

When you reach retirement, downsizing can be a challenging yet liberating process to shed the layers of our past and start anew in this new phase. As you work to find the right size for your home and the right amount of belongings, you allow ourselves to focus on building memories and release some of the burden of stuff and things. Use this worksheet to begin the process of identifying what you loved or disliked about different homes you've lived in over the years. We recommend that this activity be completed by all those who still consider **your** home to be **their** home, in some shape or form. This will help in creating clarity for your priorities as you downsize.

	Location/Geography <i>e.g. close to schools</i>	Community <i>e.g. liked our neighbors</i>	Home Characteristics <i>e.g. outdoor fireplace</i>	Care and Upkeep <i>e.g. our flower garden</i>	Memories <i>e.g. raised three kids</i>
What I/We loved					
What I/We Disliked	<i>e.g. far from beach</i>	<i>e.g. no local church</i>	<i>e.g. no workshop</i>	<i>e.g. winter shoveling</i>	<i>e.g. house fire</i>

After you reflect on the good and bad of past homes you've lived in, collect everyone's thoughts and begin creating a master document of your highest priorities. Consider the characteristics that your new home *must have*, and then things it *must not have*, and then build your *wishlist*. For the final column, list some new memories you hope to create in your next home.

	Location/Geography <i>e.g. close to water</i>	Community <i>e.g. local social clubs</i>	Home Characteristics <i>e.g. outdoor social space</i>	Care and Upkeep <i>e.g. no flood risk</i>	New Memories <i>e.g. family reunions</i>
Must Have					
Wish List	<i>e.g. close to children</i>	<i>e.g. college town</i>	<i>e.g. home gym</i>	<i>e.g. lock and go</i>	

Use this Action Plan tool to organize all of the steps you have to take to accomplish your dreams of rightsizing your home in Retirement. This tool outlines some steps that we believe to be important for all retirees who are downsizing. Add tasks where appropriate to customize this plan to match your needs.

Start the Process:

To Do:	Deadline
<input type="checkbox"/> 1. Have all stakeholders reflect on past homes (see worksheet 1)	
<input type="checkbox"/> 2. Share reflections between all stakeholders	
<input type="checkbox"/> 3. Set priorities for the next home (see worksheet 2)	
<input type="checkbox"/> 4. Create a Vision Board of what you seek in your next home (optional)	
<input type="checkbox"/> 5.	
<input type="checkbox"/> 6.	
<input type="checkbox"/> 7.	
<input type="checkbox"/> 8.	

Rightsize your Belongings:

Rightsizing your belongings can be a long and arduous process. We recommend you take this one step at a time, categorizing things into Keep, Give to family, Donate, and Trash to align your belongings with your vision. Remember, you can't take everything with you.

To Do:	Deadline
<input type="checkbox"/> 1. Establish a routine for when you will work on this, and schedule it in your calendar	
<input type="checkbox"/> 2. Identify a donation center that will do at-home pickups	
<input type="checkbox"/> 3. Communicate to children that they have a deadline to vet their belongings(if applicable)	
<input type="checkbox"/> 4. Make a list of all rooms, closets, and storage spaces in your house that need to be tackled	
<input type="checkbox"/> 5. Create a timeline for rightsizing your belongings	
<input type="checkbox"/> 6.	
<input type="checkbox"/> 7.	
<input type="checkbox"/> 8.	
<input type="checkbox"/> 9.	
<input type="checkbox"/> 10.	
<input type="checkbox"/> 11.	

Sell Your Home:

It's important to block off time to reflect on what you want in your next home. This process will give you greater clarity and will help to motivate you to tackle this project.

To Do:**Deadline**☐ 1. Financial Analysis - engage lawyer, accountant, financial planner☐ 2. Contact realtors to interview and select best fit☐ 3. Contact stager and build a plan☐ 4. Get comps to decide on pricing☐ 5. Set timeline☐ 6.☐ 7.☐ 8.☐ 9.☐ 10.☐ 11.**Find a New Home:**

Use all the work you did in setting priorities for your next home to help drive the process of finding your new home. Make the exploration of a new home as exciting, enjoyable and collaborative as possible.

To Do:**Deadline**☐ 1. Identify geographies that match your priorities☐ 2. Identify communities within those geographies that match your priorities☐ 3. Contact realtors to interview and select best fit☐ 4. Research home options on Trulia, Zillow, Estatefy, etc...☐ 5. Road trip or short term stay at desired location☐ 6. Interview local realtors, and other locals, to get a feel for the community☐ 7.☐ 8.☐ 9.☐ 10.☐ 11.