



# Downsizing Timeline Checklist

Use this timeline to keep yourself on track, reduce overwhelm, and feel confident at every step of your downsizing journey.

## ✓ PHASE 1: Thinking About Downsizing

- Consider your reasons for downsizing (health, finances, lifestyle, maintenance, etc.)
- Talk to family or trusted advisors about your goals and timeline
- Start visualizing your ideal lifestyle (location, type of home, amenities)
- Research communities and housing types (bungalow, condo, retirement living, etc.)
- Begin a list of "must-haves" vs "nice-to-haves" in your next home

## ✓ PHASE 2: Planning & Preparation

- Schedule a consultation with a downsizing-focused Realtor®
- Determine your home's current value and financial options
- Explore mortgage-free living or rental alternatives, if desired
- Research moving-related costs (movers, legal, repairs, etc.)
- Create a general downsizing timeline that aligns with your life events

## ✓ PHASE 3: Decluttering & Letting Go

- Walk through your home and list areas to declutter
- Begin sorting items into: Keep / Donate / Sell / Give to family / Toss

Host a garage sale or list items online

- Arrange donation pick-up for usable goods
- Consider hiring a downsizing professional or organizer if needed

## ✓ PHASE 4: Preparing the Home for Market

- Complete necessary repairs or touch-ups
- Freshen up paint, flooring, lighting, and landscaping (if needed)
- Stage the home to highlight space and light
- Get professional photos and listing materials ready
- Finalize pricing strategy and list your home for sale

## ✓ PHASE 5: Selling & Transition Planning

- Review offers with your Realtor® and choose the best path forward
- Hire a real estate lawyer to assist with the sale
- Arrange movers and storage (if needed)
- Set up mail forwarding, cancel utilities, update service providers
- Begin packing essentials and labelling boxes clearly

## ✓ PHASE 6: Moving & Settling In

- Complete closing day tasks (key exchange, walk-through, final paperwork)
- Move into your new home and unpack with purpose
- Familiarize yourself with your new community and services
- Register with local health care providers, community centres, etc.
- Celebrate this exciting new chapter in your life!

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