



Downsizing & Life Transition Conversation Checklist

Start early. Plan wisely. Move forward with confidence.

Step 1: Begin the Conversation

- ☐ Choose a comfortable, low-stress time to talk.
- ☐ Share your reasons for wanting to discuss future living plans.
- ☐ Agree that this is an ongoing conversation—not a one-time decision.

Step 2: Explore Lifestyle Goals

- ☐ Discuss what daily life should look like in the years ahead.
- ☐ Identify priorities—proximity to family, less maintenance, more amenities, safety, or accessibility.
- ☐ Talk about hobbies, social connections, and community involvement you want to keep or add.

Step 3: Evaluate the Current Home

- ☐ Review the physical upkeep required.
- ☐ Consider whether the layout supports current and future mobility needs.
- ☐ Factor in costs—mortgage/rent, utilities, taxes, repairs.

Step 4: Identify What Matters Most

- ☐ Make a list of possessions that hold deep personal meaning.
- ☐ Identify items that no longer serve a purpose or bring joy.
- ☐ Decide on a plan for donating, selling, or gifting unneeded belongings.

Step 5: Map Out Next Steps

- ☐ Research housing options that fit your goals.
- ☐ Set a realistic timeline for any move or downsizing process.
- ☐ Consider getting professional help with organizing, decluttering, or relocation.