

**CARLETON
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RIGHT- SIZING

CREATING A HOME THAT
FITS THE LIFE YOU LIVE
TODAY - AND THE LIFE
YOU ENVISION
TOMORROW



A thoughtful guide for homeowners considering a move to a home that
better fits their space, lifestyle, priorities and future.



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WHEREVER YOUR NEXT CHAPTER LEADS, LET
THE HATLEY TEAM HELP YOU GET THERE.



1. What Does “Right-Sizing” Really Mean?

Right-sizing is about more than moving into a smaller home - or larger home. It is about finding the **right home for the life you live now - and the life you want to live next.**

For some homeowners, that means less space and less maintenance. For others, it may mean a home with a home office, a better layout, a first-floor Bedroom, more convenient location, a manageable yard, dedicated living spaces for multigenerational living, or simply a space that feels easier to enjoy.

The goal is not to give up the things you love. The goal is to make sure your home supports the way you want to spend your time.

Right-sizing can be a lifestyle decision, a financial decision - or both.

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2. Is It Time to Right-Size?

Every homeowner's circumstances are different, but these questions may help you decide whether the time is right:

- Are there additional rooms or spaces you wish your home had?
- Are there rooms in your home you rarely or never use?
- Has home maintenance become more than you want to manage?
- Have your household needs changed?
- Would you rather spend less time maintaining your home and more time enjoying it?
- Do you want to simplify your belongings and your daily routine?
- Does your current home no longer fit the way you live?
- Would you prefer to be closer to family, friends, activities or everyday conveniences?
- Would accessing some of the equity in your home give you greater financial flexibility?



3. Right-Sizing Doesn't Mean Giving Up What You Love

One of the biggest misconceptions about right-sizing is that you have to sacrifice the features that make a house feel like home.

Instead, begin by identifying what truly matters to you. Maybe it is a beautiful Kitchen where family gathers, a comfortable Guest Room, a home Office, outdoor living space, a dedicated hobby area or plenty of storage. Those priorities should help guide your next-home search.

Then ask a different question about the rest of your space: *Is this room adding value to my life, or am I simply maintaining it because I have always had it?*

The right-sized home should feel intentional - not diminished.

4. The Emotional Side of Moving

A home can hold decades of memories. That is one reason a right-sizing move can feel emotional, even when you know it is the right decision.

Moving does not erase the memories made in your home. It simply creates an opportunity to carry forward what matters most while creating room for a new chapter.

Give yourself permission to take your time. Talk with family members. Photograph meaningful spaces. Decide which belongings tell your story and which ones have simply accumulated over the years.

Your next home can be different without making the life you have lived in your current home any less meaningful.



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*As life changes, home can
change with it. Right-sizing
isn't about having less; it's
about making room for more of
what matters.*

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5. What Should You Take With You?

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A simple way to approach belongings is to sort them into four categories:

KEEP	SHARE	DONATE	LET GO
Things you use, need and genuinely love.	Meaningful items family members may want.	Useful things that could benefit someone else.	Items you no longer use, need or want to maintain.

A helpful rule: **Don't move things simply because you have room for them.** Move the things that contribute to the life you want to live.

6. The Financial Side of Right-Sizing

Before making a move, it is helpful to understand the financial picture - not just the sale price of your current home or the price of your next one.

- Estimated current market value of your home
- Remaining mortgage balance and other liens
- Estimated selling expenses
- Approximate equity available after the sale
- Price range for your next home
- Potential moving, repair or preparation costs
- Property taxes, insurance and utility differences
- How the move may affect your monthly expenses and long-term financial goals



A personalized equity-and-move analysis can help turn a big decision into a much clearer one.

*More space isn't always
more value. Sometimes, the
greatest value is having more
freedom.*



7. Your Right-Sizing Roadmap

You don't have to figure everything out at once. A thoughtful plan can make the process feel much more manageable.

01	DREAM Think about what you want your next chapter to look like.
02	EVALUATE Understand your home's value, equity and options.
03	PREPARE Declutter, make strategic improvements and prepare for market.
04	SELL Position your home to attract the right buyers.
05	BUY Find a home that fits your priorities and lifestyle.
06	MOVE Coordinate timing, logistics and the transition.
07	ENJOY Settle in and enjoy a home that works better for you.

8. How The Hatley Team Can Help

Right-sizing is a personal decision, and you don't have to navigate the real estate side of it alone. Our role is to help you understand your options, make informed decisions and create a plan that works for **you**.

- Home valuation and personalized equity analysis
- Right-sizing and next-home planning
- Recommendations for preparing and staging your current home
- Coordination with trusted contractors and service providers
- Strategic marketing and sale of your existing home
- Identifying homes that fit your next chapter
- Negotiation and transaction guidance
- Coordinating the timing of your sale and purchase



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Thinking About What Is Next?

If you have been wondering whether right-sizing could make sense for you, let's talk. There is no obligation to sell, buy or make a decision. Sometimes the first step is simply understanding your options.



**YOUR NEXT CHAPTER
STARTS WITH THE RIGHT HOME...**

***Ready to Find the Right Fit
for What's Next? Contact Us.***



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