

the lisa naples team

The key to your real estate needs

SORTED & PACKED

YOUR GUIDE TO GETTING STARTED WITH
YOUR DOWNSIZE IN 10 STEPS



BERKSHIRE HATHAWAY
HomeServices

| Homesale Realty



"WE KEEP MOVING FORWARD,
OPENING NEW DOORS, AND
DOING NEW THINGS, BECAUSE
WE'RE CURIOUS AND
CURIOSITY KEEPS LEADING US
DOWN NEW PATHS."

-WALT DISNEY



Introduction

Is it time to get moving down a new path? Open a new door? Most people don't downsize suddenly. It's a process that can take months or years of planning. The Lisa Naples Team has helped many folks downsize into a new home (or apartment, 55+ community or retirement/senior community) and we'd love to help you. Put our years of experience to use helping you plan for your move. What can we do to help? Take a look at these 10 steps to help you get started and please contact the Lisa Naples Team to set up your personalized meeting.

Why downsize?

- Empty nest
- Can't keep up with home maintenance
- Ready to simplify your life
- Don't want to do yard work
- Don't want to do snow removal
- Only living in your primary home part time
- Can't keep up with home expenses
- Your health has changed
- Want a different layout
- Want one floor living
- Want graduated medical care
- Don't want to be a homeowner any longer
- Want to move to a different climate
- Want to move closer to family
- Want to move closer to friends
- Want to move in with family
- What are your reasons?



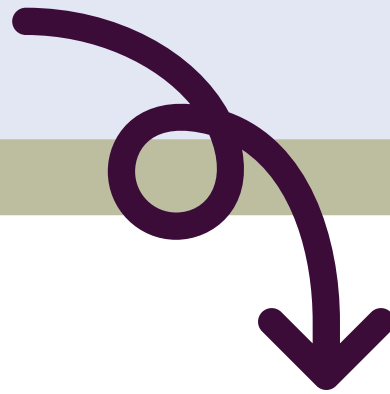


Proactive vs. Reactive

It is helpful to point out that our 10 steps are proactive, meaning you are creating or controlling a situation by causing something to happen rather than responding to it after it has happened. We understand that sometimes a move is prompted by unexpected circumstances that will require you to react. But, when you are given the chance to be in control, to be proactive, the experience is much easier to manage and involves significantly less stress. We encourage you to be proactive with the planning of your move in these 10 steps.



Step #1



Schedule a meeting with a REALTOR®

Don't wait until you are ready to sell your home to meet with a REALTOR®. They should be an integral part of your planning process. We have valuable resources that can help you every step of the way, from reliable contractors to make repairs to professional organizers to help you sort through your possessions. We are accustomed to meeting with our clients well before they are ready to list their home. One year to 18 months prior to your move is typical for our clients' first meeting. In the first meeting we will learn about your goals and answer your questions. We will help you develop a timeline for achieving your moving goals and we will share our resources with you to help you get to where you want to go. We can jump in to help at any point if your move is scheduled sooner.

My Timeline - First Draft

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Month 1

Month 2

Month 3

Month 4

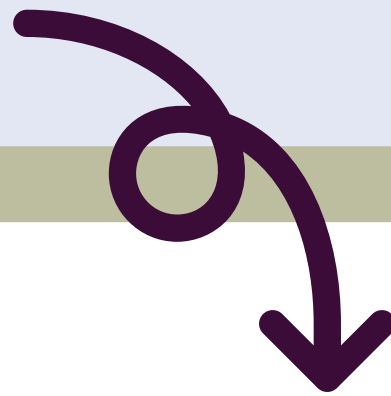
Month 5

Month 6





Step #2

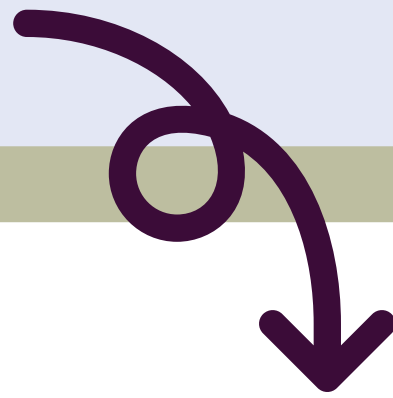


Determine Maintenance and Repairs

You may already have a list of items that need to be repaired prior to listing your home for sale. If you don't, you should create this list. Walk around your home and take note of any maintenance that is needed, like trimming landscaping back, full gutters, missing shingles, a leaking faucet, an old ceiling stain and any other things you notice. We find that many homeowners actually think they need to do more work on their home than they truly need to prior to listing. We will walk through your home with you and your list and confirm if those are worthwhile repairs or if they are unnecessary. We can also point out if there are other tasks that should be added to your list. We have excellent and reliable contractors that can do just about any home repair and we are glad to refer them to you.



Step #3



Determine where you would like to move

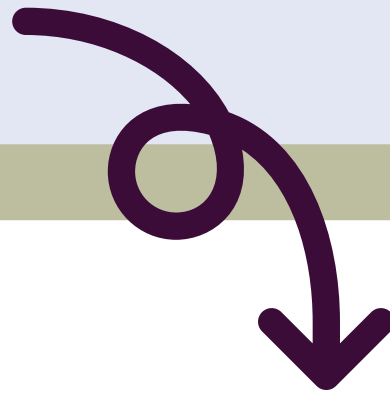
When you move, what is your destination? This may take some time. First, we suggest considering what type of setting, services and amenities are important to you. There are many options to consider. You may want to relocate to a warmer climate or live closer to family. You may want to move to a local senior living community with graduated medical care. Some want to move into an apartment to forgo all home and yard maintenance and spend more time determining the next step. Or explore over 55 communities which offer great socializing opportunities and clubhouse-style amenities but no graduated medical care. Next, get started interviewing and/or touring various communities to learn more about what they offer and figure out what is the most comfortable for you, both financially and physically.

Destination Tips

- If you are planning to relocate out of the area, across the state or to another state, we can provide a recommended REALTOR® in just about any area or areas you would like to consider. Please let us know where you are looking and we can make this introduction.
- The majority of over 55 communities work with REALTORS®. We can help you explore these communities and we can represent you as buyers in your purchase.
- Most senior living communities manage their sales in-house, without the use of REALTORS®.
- Most apartment communities manage their leasing in-house, without the use of REALTORS®.
- If you would like to simply search for a smaller home, a different home, a simpler home, a more luxurious home, a one-story home, a townhome, a condo or anything in between, we can help you explore these homes and we can represent you as a buyer in your purchase.



Step #4



Get your finances in order

You will soon realize as you evaluate your destination options you will need to know what your budget will allow. If you are considering a senior community, these communities will qualify you for a purchase. They will show you their criteria for purchasing and will review your financials with you. We have excellent financial resources we can refer to you if you'd like a professional review of your finances.



Step #5

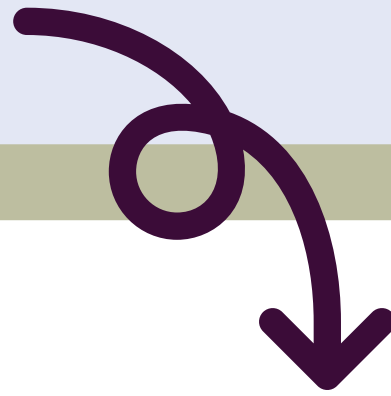


Figure out what to do with your "stuff"

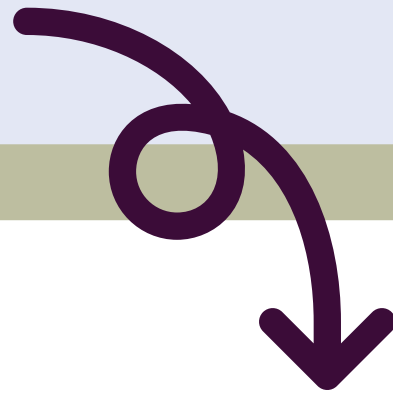
This is often the most daunting part of your downsize. We tend to accumulate stuff that fills the space we have, even when we don't need it or have a use for it. And yet it's hard to part with our things. This task becomes less daunting if you start today and begin to chip away at the stuff you know you will not want, need or have space for in your new home. Some of our clients do all of the sorting, donating and selling themselves. We have a list of resources to help with this. Other clients want someone to guide them through this. We have partners who can help you with as little or as much of this process as you need. You'd be amazed at what they can accomplish in a short period of time and they are wonderful to work with. A consultation with our recommended partners is free.

"Stuff" Tips

- Keep in mind that household goods are plentiful and have very little value when selling them. If you hire an auctioneer, expect to receive yard sale prices for your things. The exception is specialty items. An auctioneer can tell you what to expect after reviewing what you plan to sell.
- A benefit to starting to sort your items early is you have time to sell the more valuable items, rather than rushing through this process without the time to find the best buyer. Consider taking items to a consignment store if you feel they have resale value.
- A professional organizer can be a valuable resource to help you systematically sort through your belongings. They will be able to keep you on track with your timeline and they can help you donate or sell unwanted items.
- Please ask for referrals for organizers, auctioneers and other service providers. We work with the best and want you to have a great experience.



Step #6



Tune Up Your Moving Timeline

Once you have established where you are going to be moving, you can work backwards to set up a moving timeline to make sure you stay on track. When you have an estimated date of when your new home, whatever form you choose, is going to be move-in ready, we can determine when you should plan to list your home for sale. We will account for the marketing time needed, depending on the real estate market conditions at the time. This usually requires an update to your original timeline. It is very important to note that typically, the goal is that you only move one time, so you move into your new home and then close on the sale of your old home. It's helpful for us to set up periodic meetings. We can help you evaluate the progress you're making with your destination, your sorting and your home preparations.

My Timeline - Updated

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Month 1

Month 2

Month 3

Month 4

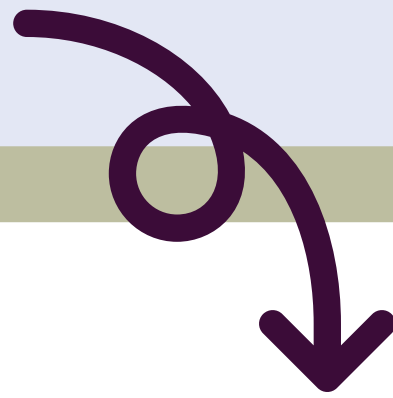
Month 5

Month 6





Step #7

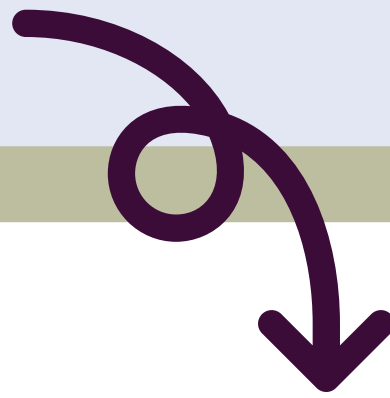


Schedule Maintenance and Repairs

Allow plenty of time for contractors to take care of any maintenance items and repairs on your list. We recommend starting this process early so that you can get a couple of quotes for any of the more costly repairs. Need a good contractor? We value the relationships we have with every contractor we work with and can assure you that you will get great service and reasonable pricing. Our approach to helping you prepare your home for sale is not to spend any money that is unnecessary. We want to help you present your home in it's current state, but with a tune-up to remove any obvious objections that buyers may have. Our focus is on you getting the most equity returned to you at settlement as possible.



Step #8

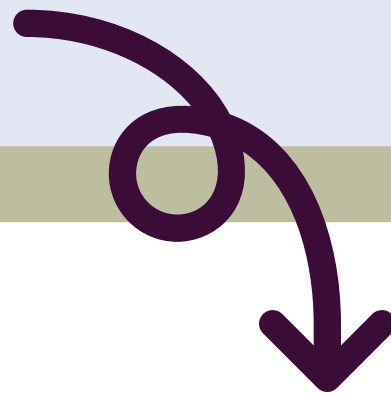


Diligently Sort/Donate/Toss Repeat

We warned you that this is usually the most daunting part of your move. Most of our clients spend the entire planning process from start to moving day sorting through their things, donating, selling and tossing. Sometimes it may seem like you are not making progress, or not enough progress. It's never too late to enlist the help of a professional organizer. This can be especially helpful if you are down to the wire and want to stick with your timeline. One added benefit of working with a professional organizer is that they can help you layout the furnishings for your new home and give you confidence that everything is going to fit the way you are expecting it to fit. Sort, donate, toss, repeat.



Step #9

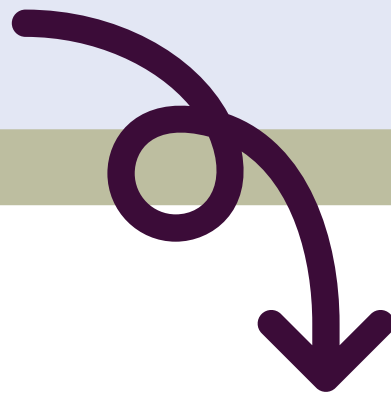


Revisit your Destination

Chances are you will need to be flexible with your timing. If you are building a new home or having a new condo or apartment remodeled, the completion date can be a moving target. This is especially true when you select a community a year to 18 months prior to the projected completion date. The schedule becomes more reliable when you are 2 to 3 months from completion. At this stage you can begin to make your final plans for listing and selling your home, knowing when you will be able to move into your new home. It is recommended that you stay in regular communication with the community to ensure you know if there are any delays on the horizon.



Step #10



Prepare Final Listing Details

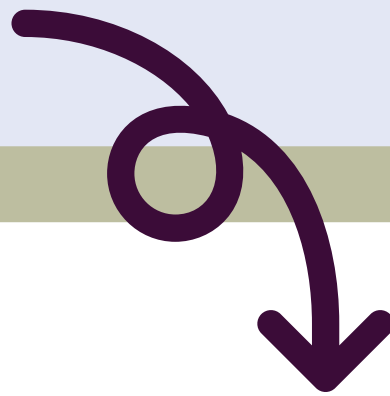
In the current market, homes are selling very quickly, so we are typically listing homes about 2 months before our clients plan to move. This allows you to move into your new home prior to closing on your old home. The timing allows you to only move once and then close on your old home very soon after you have moved out. There are many options for coordinating the timing of your move, and they will be evaluated depending on the market conditions at the time of your move. Prior to putting your home on the market we will help you with staging and we will take professional photos and video of your home. We will provide a detailed marketing plan for you to get your home sold. Our objective as your agent is to make this process as smooth and seamless as possible.

Moving Tips

- We have a few moving reminder checklists you can use during the last few weeks before you close on your home. This includes change of address reminders, utility set ups and terminations and items to have on hand on moving day.
- Be sure to hide items you do not want on the moving truck. If the movers see it, they will pack it.
- Be sure to schedule your movers no later than the day before settlement. You cannot move out of the house on the settlement date.



Final Step



Move

Even the best planning doesn't take the work out of moving. There is no doubt that a tremendous amount of work is involved. The final move includes emptying your former home of the remaining items that will move with you to your new home. We can't recommend professional movers strongly enough for this process. We have local movers that you can interview for quotes. We will walk you through the final steps of closing on the sale of your home. If you've engaged the services of a professional organizer, they can get you unpacked and set up in your new home.

Finally, you can put your feet up!



Conclusion

You've done it! A downsizing move is incredibly tough. It's emotional to part with so many of your possessions, it can be difficult to leave your home of many years and it can be exhausting. Especially the the process of sorting, donating and tossing. But, the more planning you do the smoother your move will be. We at the Lisa Naples Team are here to support you at each step of your downsizing with our resources and experience. We want you to lean on us to get you to your destination.

Contact Us!



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As a longtime resident of Lancaster County, Lisa Naples knows the area, communities and culture inside and out. Because she has been a full-time licensed REALTOR® since 2002, Lisa has gained detailed knowledge of the local real estate market and can be your resource for current real estate market information. When she is not helping her clients with their real estate needs, Lisa enjoys spending time with her husband, Robert, their two daughters and their two dogs. By using the latest technology and tools and staying informed in the ever-changing industry, Lisa will keep you educated from start to finish, meet your goals, and exceed your expectations.

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