

Right-Size *or* Stay?

A Thoughtful Guide
to Deciding Whether Your
Current Home Still Fits
Your Life.



HOME



LIFESTYLE



FAMILY



LOCATION



WHAT'S NEXT



1. Is Your Home Still Working for You?

Your home has given you so much over the years. Now, it's worth taking a closer look at whether it still fits the way you live today.



Check any that apply: _____

- ☐ We have rooms we rarely use.
- ☐ Maintaining the yard feels like more work than enjoyment.
- ☐ Cleaning the house takes more time than we'd like.
- ☐ We have more storage than we actually need.
- ☐ The layout no longer fits how we live.
- ☐ Stairs are becoming inconvenient.
- ☐ The home requires repairs or upkeep we're tired of managing.
- ☐ The home feels bigger than our current needs.



Every season of life looks different — and your home should support the season you're in now.

0 – 2

YOUR HOME
MAY STILL BE
A GREAT FIT.

It seems to meet your
current needs and lifestyle.

3 – 5

IT MAY BE WORTH
EXPLORING
YOUR OPTIONS.

You might benefit from
a closer look at what could
work better for this season
of your life.

6+

IT MAY BE TIME
FOR A RIGHT-SIZING
CONVERSATION.

Your home may no longer
be aligned with your current
needs and goals.



Please note:

This checklist isn't a recommendation to sell. It's simply a starting point for reflection.



2. Has Your Life Changed?

Your home should support the life you're living now – and the one you want ahead.

Check any that apply: _____

- ☐ The kids have moved out.
- ☐ We're traveling more.
- ☐ We'd like to travel more.
- ☐ We want more time for family and friends.
- ☐ We want to spend less time maintaining our home.
- ☐ We'd prefer to live closer to family.
- ☐ We want to be closer to restaurants, shopping or activities.
- ☐ We want a home that is easier to lock up and leave.
- ☐ Our priorities have changed.

Your home should support your life – not dictate it. ♥

A HOME THAT FITS YOUR NEXT CHAPTER MIGHT GIVE YOU MORE TIME FOR...



TRAVEL



FAMILY & FRIENDS



GOLF OR HOBBIES



WELLNESS



DINING & LOCAL EXPERIENCES



A MORE RELAXED LIFESTYLE



3. What Would Change If You Moved?

A move can create new opportunities, but it's important to look at the complete picture — your home, your finances and your next chapter.



Check any that apply: _____

- ☐ Lower maintenance costs.
- ☐ Lower property taxes or housing expenses.
- ☐ More money available for travel and experiences.
- ☐ Less money tied up in the home.
- ☐ Access to home equity for future needs or goals.
- ☐ A more convenient location.
- ☐ A home that's easier to maintain.
- ☐ More time and flexibility for the things we enjoy.
- ☐ A home that better fits our current stage of life.



The right home can create more freedom for the life you want next.

THINGS TO CONSIDER



COSTS

What might your ongoing expenses look like?



LIFESTYLE

Would a different home give you more time for what you love?



LOCATION

Would a new location better fit your daily life?



EQUITY

How could your home equity support your next chapter?



Keep in mind:

Real estate and financing go hand-in-hand. Our team combines local real estate expertise and trusted lending guidance to help you explore your options and make informed decisions with confidence.



4. What Could Your Next Chapter Look Like?

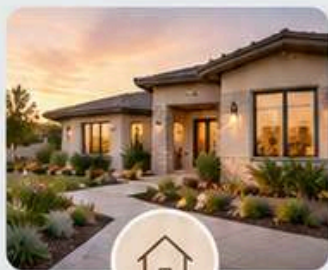
There's no one-size-fits-all answer. Right-sizing can look different for everyone. Here are some options to consider.

Which of these appeal to you? _____

- ☐ A single-story home.
- ☐ A smaller yard with less maintenance.
- ☐ A lock-and-leave property.
- ☐ A walkable neighborhood.
- ☐ A home closer to family.
- ☐ A home closer to dining, shopping or activities.
- ☐ A home that makes travel easier.
- ☐ A home with a layout that fits your current needs.
- ☐ Exploring a 55+ community or active adult living.
- ☐ Staying in your current home with a few adjustments.
- ☐ We're not sure yet, but we're open to exploring options.

The right home opens the door to more of what matters now. ♥

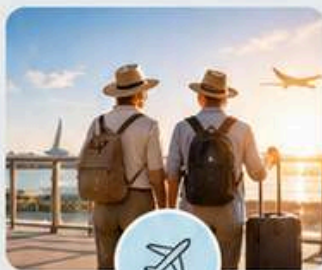
IT MIGHT LOOK LIKE...



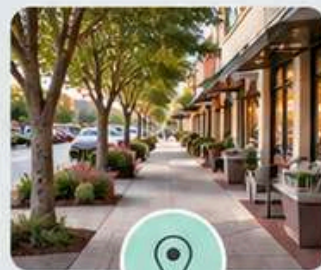
A SINGLE-STORY HOME



A SMALLER YARD WITH LESS MAINTENANCE



A LOCK-AND-LEAVE PROPERTY



A WALKABLE NEIGHBORHOOD



Remember:

Right-sizing isn't about a specific type of home — it's about finding what aligns with your lifestyle, your goals and the season you're in now.



5. So... Should You Right-Size?

Add up the boxes you checked on Pages 2–5 to see what your answers might suggest.

*Different seasons.
New possibilities.* 



Your Right-Size Score

TOTAL CHECKMARKS:

0 – 5

STAY & ENJOY

Your home may still be a great fit for your current lifestyle. Keep enjoying the space and the memories it brings.



6 – 10

EXPLORE YOUR OPTIONS

It may be worth taking a closer look at what other options could look like for this season of your life.



11+

START A CONVERSATION

Your home may no longer be aligned with your current needs and goals. This could be a good time to explore what's next.



 *Remember:*

Your score isn't a recommendation to sell. It's simply a starting point for reflection and a helpful way to think through your options.



THE BIGGER PICTURE

Right-sizing isn't just a real estate decision — it's a lifestyle decision. It's about creating more freedom, more time and a home that supports what matters most in this next chapter.



LET'S TALK ABOUT

Ready to Explore Your Next Chapter?

Real estate and financing go hand-in-hand. Get the guidance you need — all in one trusted team.



IT'S AS EASY AS 1, 2, 3

1



Get Our Free Guide

Helpful information on right-sizing, home options and key financial considerations for your next chapter.

2



Join Our Newsletter

Get local market updates, right-sizing tips and resources delivered straight to your inbox.

3



Schedule a Conversation

A no-obligation home or loan evaluation to explore your options and see what's possible for your next chapter.

Let's Plan What's Next.

Whether you're exploring your options, ready to make a move, or just have questions — we're here to help.



SCAN ME



REAL ESTATE EXPERTISE

Local knowledge and guidance you can trust.



FINANCING SOLUTIONS

Personalized lending options to fit your goals.



A TEAM APPROACH

Working together to make your next chapter possible.