



**OVERVIEW:**

*If you've been feeling dissatisfied with your current home, it may be time to rightsize—either upsize or downsize to a space that better suits your needs.*

***Whether transitioning to a larger or smaller home, utilize these checklists to help ensure you achieve all your objectives.***

**WHAT'S INCLUDED:**

- **Rightsizing Checklists**  
*Two guides to help you through the upsizing or downsizing process*



### **Identify your reasons for moving**

- Examine the shortcomings of your current residence (e.g., too little space).
- Consider your lifestyle preferences and what features may match them (a backyard patio, home office, etc.).

### **Examine the financial implications**

- Explore various mortgage plans to determine your borrowing capacity.
- Calculate your anticipated expense increases, such as for your mortgage payments, property taxes, and homeowners insurance.
- Consider costs like maintenance, upkeep, and repairs.
- Create a dedicated budget for furnishing your new space.

### **Prepare and organize**

- Sort and discard any items you no longer need for a clutter-free move.
- Measure your furniture, and create a detailed floor plan that can help you determine what items you may need to upgrade or add.



### **Define your goals**

- Evaluate the lifestyle you envision, including location, accessibility to desired amenities, and social-engagement preferences.
- Decide on the style of home you desire, whether it's a condo, a small bungalow, or a ranch home in an active-adult community.
- Evaluate your future mobility; this can influence the features you may need, especially as you age.

### **Assess your belongings**

- Measure large items such as sofas, recliners, bedroom furniture, and oversized area rugs to better gauge what will fit in your new space.
- Discard any belongings you won't have room for after your move.

### **Make the most of your new space**

- Designate specific areas for activities and storage, such as a dedicated reading corner with built-in shelves or a crafting nook with its own countertop.
- Consider multifunctional pieces like a sofa bed or an ottoman with hidden storage compartments.
- Arrange your furniture to encourage easy movement and create a sense of openness and spaciousness.
- Embrace your outdoor spaces, whether a balcony, patio, or garden, to make them an extension of your living area.