

Home Transition Planning Guide

For homeowners and families planning a smaller home, condo, independent living or a senior community. Start with the next move and work backward.

Name: _____ Property: _____

1. Decide what the next home must provide

Preferred location / housing: _____

Priorities: accessibility, maintenance, transportation, social connection and proximity to family. Ask each community which services and care options it actually provides.

2. Connect the move and sale timelines

Target move date: _____ Next housing confirmed? yes / no / exploring

Compare selling first, buying/moving first, or coordinating both. Discuss temporary housing, overlapping costs and financing before choosing a sequence.

Who makes decisions? _____ Family contact: _____

3. Compare the full monthly costs

Current home: loan \$ _____ + taxes/insurance \$ _____ + utilities/upkeep \$ _____.

Next home: payment or rent \$ _____ + fees \$ _____ + services/other costs \$ _____.

Ask what is included, what costs extra, and how fees or care needs could change.

Allow for moving, deposits, preparation, selling costs and an overlap reserve.

4. Make the home and belongings manageable

- ☐ Sort into keep, family, donate, sell and discard; protect important documents.
- ☐ Compare as-is sale with a limited preparation plan based on cost and likely benefit.
- ☐ Assign movers, cleanout, repairs and packing to named people or vendors.
- ☐ Plan showings around comfort, privacy, pets, health needs and daily routines.

5. Build your first action plan

Biggest concern: _____

Next three steps: 1. _____ 2. _____ 3. _____

Ask Andrew to connect the sale strategy with your chosen housing and timeline.

Your next step

Bring this page to a conversation with Andrew. Together, we can build a property-specific plan around your goals, timing, and next decision.

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Local support: Wisconsin ADRC - Find local resources for information about housing, services and support options.

Planning resource | September 2026. Confirm legal, tax, financing, and care questions with the appropriate professional.