TINA FOX REALTY | PEMBERTON REAL ESTATE

Downsizing

Guide & Workbook

PLAN • ORGANIZE • SIMPLIFY • MOVE





Your next chapter can be a positive one.

A fresh beginning, at your own pace.





A PRACTICAL WORKBOOK FOR HOMEOWNERS & FAMILIES

Checklists • Room-by-room planning • Furniture measurements • Notes

WELCOME

I'm so glad you're here!



This is a new journey, and it can be a positive one. Whether you are ready to move now or just beginning to explore your options, you deserve a thoughtful plan that feels right for you.

Your home holds memories, traditions and years of life. Downsizing does not mean leaving those memories behind. It means choosing what matters most and creating space for what comes next.

You don't need to do everything at once. Start with one conversation, one drawer, or one room. Each small step is progress worth celebrating.

This workbook is your space to plan, reflect, measure, and move forward with confidence.

What are you most looking forward to in your next chapter?

Warmly, Tina Fox

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Your guide at a glance

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Why consider downsizing?



A smaller home can mean less maintenance, simpler routines, easier access and more time for what you love. Your reasons are personal, and they deserve space.

- [ ] Less maintenance or yardwork
- [ ] One-level living or improved accessibility
- [ ] Closer to family, friends or services
- [ ] Lower monthly housing expenses
- [ ] More freedom to travel or enjoy hobbies
- [ ] A home that better fits this season of life

My three most important reasons:

A THOUGHTFUL SELF-CHECK

Is it the right time?



You do not need to make a decision today. Use these questions to start a conversation with the people you trust.

- [ ] Are there rooms I rarely use?
- [ ] Does home upkeep feel like too much?
- [ ] Would fewer stairs make daily life easier?
- [ ] Do I want to live closer to people or activities?
- [ ] Would a different home better fit my budget?
- [ ] Do I have support if I choose to move?
- [ ] Do I know what I want from my next home?

What is holding me back, and what would help?

COMPARE YOUR OPTIONS

Key factors to consider

Before choosing a home, think beyond square footage. Consider daily routines, future accessibility, community and total monthly costs.

LOCATION

Distance to family, shopping, healthcare and activities

ACCESSIBILITY

Stairs, entryways, bathroom layout and safety

LIFESTYLE

Privacy, neighbors, hobbies, outdoor space and maintenance

FINANCES

Mortgage or rent, HOA fees, taxes, insurance and upkeep

My non-negotiables in a future home:

Your downsizing timeline



Build a timeline that fits you. These are suggestions, not deadlines.

3–6 MONTHS BEFORE

- [ ] Discuss your goals and housing options
- [ ] Begin sorting one easy space
- [ ] Meet with a real estate professional

1–3 MONTHS BEFORE

- [ ] Measure furniture and possible new rooms
- [ ] Request estimates from movers or organizers
- [ ] Review repairs and selling costs

FINAL WEEKS

- [ ] Confirm packing, utilities and important records
- [ ] Pack essentials separately
- [ ] Plan for keys, access and moving-day help

My target move date and first three steps:

SORT AT YOUR OWN PACE

Room-by-room checklist



For each area, decide what to keep, gift, donate, sell or discard. Start with the least sentimental space.

KITCHEN

- [ ] Cabinets and pantry
- [ ] Dishes and small appliances
- [ ] Duplicates and expired items

BEDROOMS

- [ ] Clothing and linens
- [ ] Closets and drawers
- [ ] Extra furniture

LIVING AREAS

- [ ] Books and décor
- [ ] Electronics and cords
- [ ] Photos and keepsakes

GARAGE & STORAGE

- [ ] Tools and seasonal items
- [ ] Boxes and unused equipment
- [ ] Hazardous items for proper disposal

Sentimental items & heirlooms



Some things are more than objects. Give yourself time to decide what should be kept, shared, photographed or passed on.

- [ ] Keep a small collection of the most meaningful items
- [ ] Offer heirlooms to family members without pressure
- [ ] Photograph objects and record their stories
- [ ] Digitize letters, photos or important memories
- [ ] Create a memory box for special keepsakes

Items I want to pass on — and to whom:

Preparing your home



Before spending money on updates, talk with your agent about which improvements may matter to buyers. You may not need to do as much as you think.

- [ ] Review the home’s condition with my agent
- [ ] Identify safety or repair concerns
- [ ] Decide what to clean, repair or leave as-is
- [ ] Arrange help with organizing or junk removal
- [ ] Make a photography and showing plan
- [ ] Collect warranties, manuals and service records

My priority projects and people who can help:

Financial planning

Use this page to organize estimates. Confirm actual numbers with your lender, title company and financial or tax advisers.

Estimated home sale price	
Mortgage and other payoff amounts	
Estimated selling expenses	
Expected net proceeds	
Moving, storage and cleanout costs	
New home purchase or rental costs	
Monthly housing expenses after moving	

Questions for my financial or legal advisers:

Will it fit?

Measure in inches. Remember doorways, hallways, corners and clearance for walking around furniture.

NEW HOME SPACE	LENGTH	WIDTH	NOTES
Living room	_____	_____	_____
Dining area	_____	_____	_____
Main bedroom	_____	_____	_____
Guest bedroom	_____	_____	_____
Office / den	_____	_____	_____
Other	_____	_____	_____

ACCESS & CLEARANCES

Front door clear opening _____

Narrowest hallway _____

Stairs / elevator _____

Tight turns / other _____

Will it fit?

Measure each piece before deciding what to bring. Include depth, width and height, and allow room for doors to open.

FURNITURE ITEM	WIDTH	DEPTH	HEIGHT	KEEP?
Sofa	____	____	____	____
Recliner	____	____	____	____
Dining table	____	____	____	____
Bed / frame	____	____	____	____
Dresser	____	____	____	____
Desk	____	____	____	____
Bookcase	____	____	____	____
Other	____	____	____	____

Pieces to gift, donate or sell:

Moving day made easier



The right help can make this process smoother. You can ask professionals, friends or family to handle the heavy lifting.

- [ ] Get written moving and packing estimates
- [ ] Confirm donation pickups and cleanout help
- [ ] Set aside medications, valuables and documents
- [ ] Transfer utilities, mail and subscriptions
- [ ] Label boxes by room and priority
- [ ] Pack a first-night essentials bag
- [ ] Confirm arrival times, parking and keys

Moving-day contacts and important reminders:

Your support team

Keep the names of people who can help you throughout the transition.

Family or trusted friend _____

Real estate professional _____

Professional organizer _____

Mover / packing service _____

Donation or junk removal _____

Lender / title company _____

Attorney / financial adviser _____

Other _____

Your next chapter



A successful move is not about doing everything perfectly. It is about making choices that support the life you want to live.

What I am most looking forward to:

Who will I ask for help?

My next small step:

You did it!

Congratulations on your next chapter.

You have made thoughtful choices, honored memories and created room for new experiences. Every drawer sorted, conversation started and decision made deserves recognition.

Your next home can be a place for new routines, relationships and memories. Enjoy the possibilities ahead.

What I am proud of:

With warm wishes, Tina Fox

Notes & ideas



More notes

Your next chapter starts with a conversation.

No pressure. Just a plan that works for you.

Let’s write your next chapter together.



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