

— YOUR NEXT MOVE —

A Guide to Downsizing





IS IT TIME TO DOWNSIZE?



HOW YOU'LL KNOW

- Too Much Space** – Unused rooms you no longer need.
- Maintenance Feels Overwhelming** – You're ready for less cleaning and yard work.
- Stairs Feel Like a Hassle** – One-level living sounds simpler and safer.
- You Crave Simplicity** – You want to spend time on what matters most, not upkeep.
- You're Ready for Less Stress** – A smaller home means a lighter, easier lifestyle.
- You Want the Right Fit** – A home that meets your needs today, and in the years ahead.

QUESTIONS TO CONSIDER FOR THE NEXT STEP

1. WHERE DO I WANT TO LIVE?
2. WHAT TYPE OF HOME DO I WANT?
3. HOW DO I SELL MY CURRENT HOME?
4. WHAT DO I DO WITH ALL OF MY STUFF?
5. HOW DO I MINIMIZE THE STRESS OF MOVING?

WHERE DO I WANT TO LIVE?

FINDING THE RIGHT COMMUNITY FOR YOU

ACTIVE ADULT COMMUNITIES

- Typically require one resident to meet a minimum age.
- No health care or meal services provided.
- May include condos, townhomes, or single-family homes.
- Often feature amenities like fitness centers, pools, and social clubs.

INDEPENDENT LIVING STYLE

- Independent living communities offer active, healthy older adults a lifestyle full of social, recreational, and educational activities.
- They're often age-restricted and provide limited health services but may include meal plans and housekeeping.



ASSISTED LIVING COMMUNITIES

- An assisted living community offers a vibrant, supportive environment where older adults enjoy both independence and personalized care.
- These communities feature comfortable residences, engaging activities, chef-prepared meals, and compassionate daily support — all designed to enhance quality of life and well-being.



CONTINUING CARE RETIREMENT COMMUNITIES

- Continuing Care Retirement Communities (CCRCs) offer a full range of living and care options—independent living, assisted living, and skilled nursing—all on one campus.
- Contracts vary from all-inclusive “life care” plans to “fee-for-service” models where care is provided as needed.





HOW TO SELL MY CURRENT HOME

AT NEXT STEP LIVING, WE HAVE A PROVEN PROCESS FOR SELLING YOUR HOME

WE CAN ASSIST WITH

- **Preparation** – Before putting your home on the market, we'll help you identify the best ways to elevate its condition and maximize its potential.
- **Pricing** – We analyze recent comparable sales and market trends to determine the ideal asking price for your home.
- **Promotion** – We use professional photography and a three-phase marketing strategy across multiple channels to attract qualified buyers.
- **Paperwork** – We review all offers, negotiate the final contract, and guide you through every step from signing to closing.

SUITE OF SERVICES



HOME EVALUATIONS & REAL ESTATE SALES

Selling a longtime family home can be emotional and challenging. We understand that connection. We help older adults and their families assess needs, determine market value, and prepare the home for sale.

We offer:

- Free home evaluations to plan the best approach.
- Custom marketing to attract the right buyers.
- Decluttering, repairs, and staging through Compass Concierge.



DOWNSIZING ASSISTANCE

For many seniors, downsizing is more than moving—it's a major life transition. We help make the process smooth and stress-free by:

- Personalized downsizing plans tailored to your needs and timeline.
- Help with organizing, decluttering, and preparing your home for sale.
- Compassionate support throughout the transition.



MOVE MANAGEMENT

Moving can be overwhelming at any age, but older adults often need extra care. Our trusted Move Management partners offer full support, including:

- Coordinating all move logistics, from packing to transport.
- Managing vendors such as movers, cleaners, and contractors.
- Assisting with your transition to a new home or living arrangement.



ESTATE PLANNING & LEGAL REFERRALS

Preparing for the future involves more than just real estate decisions. We work with a network of trusted professionals to provide:

- Estate planning resources to protect your assets and honor your wishes.
- Legal referrals for elder law, wills, and guardianship.
- Financial guidance for long-term care and real estate planning.



HOW CAN WE HELP TO MINIMIZE STRESS?



We'll help you determine the best sequence based on your financial goals, timing, and market conditions, and negotiate the terms so you can move forward with confidence.



We've helped countless clients navigate the emotional and logistical challenges of moving from a longtime home to a more manageable space — and we'll be by your side from the first conversation to your first night in your new home.



Whether you're ready to downsize or just exploring the idea, let's talk. We'll listen, answer your questions, and create a plan tailored to your needs — you don't have to do it alone.

RESOURCES:

- ESTATE PLANNING
- FINANCIAL GUIDANCE FOR LONG-TERM CARE
- REAL ESTATE PLANNING
- LEGAL PROFESSIONALS
- HOME CONDITION ASSESSMENT



LET US HELP YOU NAVIGATE THIS NEW CHAPTER WITH PEACE OF MIND

Compass Plus is a specialized division of Compass, the nation's leading real estate brokerage, created to address the growing need to serve older adults in real estate.

As **Compass Plus agents** and members of the Compass Plus Board of Directors, **Laura and Michelle** are dedicated to helping older adults navigate significant life changes with care and dignity. We are Certified **Senior Advisors (CSA)** and **Senior Real Estate Specialists (SRES)**, trained to provide not only expert real estate guidance but also personalized support through the emotional and logistical challenges of these transitions.

We offer a comprehensive suite of real estate services tailored to the unique needs of seniors and their families. From downsizing to transitioning into senior living, we're here to guide you every step of the way.





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