

A photograph of a cozy reading nook. A window with a view of trees with autumn foliage is visible. The scene is framed by a white, torn-paper-like border. The text is overlaid on this border.

# THE NEXT CHAPTER METHOD

YOUR EQUITY TO LIFESTYLE PLAN

RESULTS

TEAM

COMPASS

# A NOTE FROM US



## HELLO! WE'RE THE RESULTS TEAM.

If you've lived in your home for 20, 30, or even 40 years, this is more than a real estate decision. It's where birthdays were celebrated. Where children grew up. Where grandchildren now run through the same hallways. It's where holidays were hosted and memories quietly layered over time. And for many homeowners in this season of life, there comes a moment – sometimes subtle, sometimes sudden – when you begin to wonder: Is it time for something different?

We also know that sometimes this conversation begins unexpectedly – after the loss of a spouse or parent. Whether you are personally navigating a life transition, helping a parent simplify, or managing an inherited home, this season requires clarity, patience, and guidance.

We've had the privilege of walking alongside longtime homeowners, widowers, and families helping their parents transition into the next phase. We've coordinated estate sales, worked with trusted contractors, planned thoughtful timelines, and helped clients unlock significant equity they didn't realize they had.

But more than anything, we've learned this:

The most peaceful transitions are never rushed, rather they are designed. This guide is meant to help you begin that process – whether you're ready now or simply thinking 1-3 years ahead.

You don't have to decide today. But starting the conversation early creates options, clarity, and confidence.

STEP ONE

# CLARITY

IT'S NOT ABOUT SHRINKING YOUR LIFE,  
IT'S ABOUT RIGHTSIZING IT.

# IS IT TIME?

If you, a parent, or someone you love is over 55 and has lived in the same home for 20, 30, or even more years, it may be time to ask a few thoughtful questions. We call this The Great Downsize – but it’s not about shrinking your life. It’s about rightsizing it, creating a home that fits this stage of life, and designing your next chapter with intention. This page will help you reflect on whether now is the right time to begin that conversation.

ARE THERE UNUSED ROOMS IN YOUR HOME?	IS HOME MAINTENANCE FEELING OVERWHELMING?	ARE YOUR KIDS SUGGESTING LESS SPACE MIGHT BE EASIER?
Yes	Yes	Yes
No	No	No
DO YOU WANT OR NEED TO USE YOUR HOME EQUITY?	ARE YOU INTERESTED IN A LIFESTYLE CHANGE?	DO YOU WANT TO BE CLOSER TO FAMILY?
Yes	Yes	Yes
No	No	No

## WHAT’S NEXT

If you said “yes” to three or more of these questions, it might be time to seriously think about downsizing. But what does that really look like – and what comes next? —>

The answer isn’t just about selling a house. It’s about exploring your options, understanding your equity, and creating a plan that sets you up for a simpler, smarter, and more fulfilling next chapter.

# THINKING AHEAD

Clarity isn't about rushing into a decision. It's about understanding where you are today and imagining what your next chapter could look like. Use the space below to reflect, answer questions, and start thinking intentionally about your next move.



## 1 TAKE INVENTORY OF YOUR SPACE & LIFESTYLE

Walk through your home and notice which spaces you use – and which sit empty.

- Rooms I use every day: \_\_\_\_\_
- Rooms that feel unused or cluttered: \_\_\_\_\_
- Storage areas that need attention: \_\_\_\_\_
- What I enjoy most about my current space: \_\_\_\_\_
- What I'd like to change in the next home: \_\_\_\_\_



## 2 CONSIDER TIMING & YOUR GOALS

Think about when you might want to move and what's influencing your timing.

My ideal move timeline:  0–12 months  1–2 years  3–5 years  5+ years

Life changes that could impact timing: \_\_\_\_\_

What planning now could make the move easier: \_\_\_\_\_



## 3 REFLECT ON EMOTIONAL READINESS

Downsizing is as much emotional as it is practical. Reflect on what matters most to you.

Memories or spaces I want to preserve: \_\_\_\_\_

Items I'm ready to let go of: \_\_\_\_\_

What feelings come up when I imagine leaving this home: \_\_\_\_\_



## 4 EXPLORE YOUR OPTIONS

Imagine the possibilities for your next home. Check the ones that feel appealing:

- Smaller home in the same neighborhood
- 55+ community (Del Webb, Carolina Preserve, Glenaire, etc.)
- Closer to children/grandchildren
- Urban lifestyle / walkable neighborhood
- Low-maintenance townhome or ranch
- Other: \_\_\_\_\_



## 5 ASK FOR GUIDANCE EARLY

Who can support you in this process?

Trusted real estate advisor: \_\_\_\_\_

Contractors / estate sale companies: \_\_\_\_\_

Family members to involve: \_\_\_\_\_

Questions I want to ask an expert: \_\_\_\_\_

Clarity is the first step in designing your next chapter. It's about understanding what you truly want, what you can let go of, and what possibilities exist for your next home – your next life chapter. Take your time, write down your thoughts, and know that every reflection you make today is a step toward a smoother, more intentional transition tomorrow.