



DOWNSIZING GUIDE

A STEP-BY-STEP PATH TO YOUR NEXT CHAPTER



“ Home is not just where you’ve been - ”
it’s where you’re going next.

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A Personal Note to You



I understand that downsizing is not just a move - it's a meaningful life transition. Your home holds years of memories, milestones, and moments that matter. This guide was thoughtfully created to support you with a calm, organized, and compassionate approach- so you can move forward with clarity, confidence, and peace of mind.

I'm Here for You

My mission is provide a truly concierge-level experience - one that feels supportive, organized, and deeply personal.

Whether you are just beginning to consider downsizing or ready to take the next step, I am here to guide you with care and expertise.

What This Guide Covers:

- Your Vision
- Create Your Timeline
- Simplify
- Envision the Right Size for Your Next Home
- Preparing Your Home to Sell
- Organize Your Records & Documents
- Understand The Financial Picture
- Plan Your Move
- Honor the Transition
- Welcome Your Next Chapter

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Begin with Your Vision

Before making any decisions, take a quiet moment to reflect.

- What do I want daily life to feel like in my next home?
- What spaces or features will support my lifestyle moving forward?
- What am I ready to simplify? What do I want to hold onto?

There is no rush here. Clarity at the beginning makes every step smoother.

Create a Comfortable Timeline

Downsizing is best approached thoughtfully - not hurriedly.

A gentle planning framework:

- 3-6 months out: Begin sorting and early planning
- 2-3 months out: Continue organizing and prepare the home
- 1 month out: Final touches and listing preparation
- Moving period: Pack, transition, and settle in.



I will guide you through each phase at a pace that feels right for you.

SIMPLIFY

WITH INTENTION

Letting go of belongings can feel overwhelming- but with the right system, it becomes manageable.

- Keep - Items you use regularly and truly love
- Share- Gifts to family and friends
- Donate - Items that can serve someone else
- Sell - Pieces of value worth passing on
- Release - Items that no longer serve you

RIGHT-SIZE

Your next home should support ease, comfort, and enjoyment. I can help you plan layouts in advance so your new home feels just right.

- Prioritize furniture that fits your future space
- Choose pieces that are functional and meaningful
- Let go of items that no longer align with your lifestyle.



PREPARE YOUR HOME WITH CARE

A well-prepared home invites buyers in and allows them to connect emotionally. My goal is to honor your home while positioning it beautifully and strategically for the market.

Our approach includes:

- Thoughtful decluttering and light staging
- Simple, impactful updates
- Enhancing natural light and flow
- Creating a warm, welcoming environment

ORGANIZE IMPORTANT DETAILS

Staying organized reduces stress and keeps everything on track.

Helpful items to gather:

- Property and tax records
- Utility Information
- Warranties and manuals
- Service providers and contacts



UNDERSTAND THE FINANCIAL PICTURE

Downsizing often creates new financial flexibility.

Together, we'll review:

- Your home's current market value
- Estimated proceeds and costs
- Options for your next home
- Timing strategies that work in your favor

My role is to help keep everything in one easy-to-manage place and to ensure you feel informed, comfortable and confident every step of the way.



PLAN YOUR MOVE

A SMOOTH, SUPPORTED MOVE



A well-organized move makes all the difference.

I recommend:

- Booking trusted movers early
- Labeling and organizing thoughtfully
- Preparing an “essentials” box for your first days
- Coordinating timing to reduce stress

If needed, I can connect you with professional who specialize in senior transitions and full service moves.

HONOR THE TRANSITION

It's completely natural to feel a mix of emotions during this time.

Take the time to:

- Reflect on memories your home holds
- Celebrate the life you've built
- Look forward to a simpler, more supported lifestyle

This is not just a move – it's a meaningful step forward.



WELCOME YOUR NEXT CHAPTER

Downsizing offers:

- Less maintenance
- Greater freedom
- A home that aligns with your current lifestyle
- Most importantly - a fresh start, designed around you.





THANK YOU



Thank you for trusting my expertise not just in real-estate, but in relationships, life transitions, and the meaning we carry with us from one home to the next.

Downsizing is never just about square footage, there is so much more. I'm grateful to be apart of that process with you.

Wherever your next chapter takes you, I hope it feels like home – and I'd love to help you get there.

With gratitude,
Lauren Klein



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