

# **Is Your Housing Right-Sized for You?**

## **Housing Transition Questionnaire**

The purpose of this questionnaire is to assist you in recognizing, dissecting, evaluating, and documenting the issues, needs, and alternatives associated with your current and future housing options and illuminating the criteria important in making a decision to stay in your existing home or transition to a new environment. As "seniors" ourselves, we have been through this analysis before and made the decision to adjust our housing environment. A ten (10) year planning horizon is recommended.

While this questionnaire (Reference Don Cook) is not conclusive, we have found this first step important in understanding some of the relevant issues to be investigated. Upon completion, we would like to meet with you to further explore your needs and desires and discuss the alternatives available for you.

1. Describe any improvements or upgrades you've made to your home in the last 5 years.
2. If you could change anything about your house, what would it be?

3. Do you look at your home as an investment or an expense?
4. If you could live anywhere you wanted, where would it be? (Closer to children, warmer climate, ocean side, mountains, etc.)
5. Do you foresee any changes in your physical well-being that will require you to move or modify your home in the next 5 years?
6. Have you experienced any challenges in keeping your house maintained?
7. Do you know if your current AC and heating are energy efficient models?
8. Have you investigated any neighborhoods or facilities that are geared to people our age?
9. Have you considered downsizing or moving to a smaller house?

10. If you had the day off tomorrow, with money or access not an issue, what would you do for the day?
11. Do you and your spouse like the same activities? Please list for each spouse.
12. When is the last time someone gave you a detailed estimate of what your home is worth?
13. Is home ownership important, or is freedom to come and go worry free more important?
14. Have you had family or friends suggest you might benefit from a move?
15. If the house was on fire, what would be the first thing you would try to save?
16. What would a new house have to have in order to feel like a home?

17. Will you be using retirement funds or savings to purchase your next home (if you are considering moving), or will you use the money you get from your existing home?
18. How do you use the rooms in your home right now? Are any of them rarely ever used?
19. How many cars do you need to park?
20. Do you enjoy yard work or do you have it done for you?
21. Who's the best cook at your house? Is your kitchen suited for what you like to fix?
22. Have you ever wished you could just sell the house and travel?
23. Do you feel financially secure in staying in your existing home?

24. What Community needs (mobility / transportation, medical care, senior centers, churches, socialization) are important to you?

As a final note, our goal is to be considered a “trusted advisor” and not someone who is looking to collect commissions for buying or selling someone a house. The Blume Team @ Keller Williams relies on referrals from satisfied clients, e.g., we are not a “numbers” team but one that considers “what is best for our clients”, not our pocketbook. We can assist you in assessing the answers to these questions and preparing multiple housing solutions for your consideration.