

Downsizing Readiness Checklist

Your step-by-step assessment - from Monica Samuels, MAS Realty & Investments

"God is God." - Monica Samuels

SECTION 1: FINANCIAL READINESS

Review each item honestly. Check every box that applies to your situation today.

- ☐ I know approximately what my home is worth in today's market
- ☐ My home is paid off or has minimal remaining mortgage balance
- ☐ My monthly housing costs (taxes, insurance, utilities, maintenance) feel burdensome
- ☐ I spend more than \$4,000/year on home maintenance and repairs
- ☐ I have spoken with a financial advisor about my retirement income needs
- ☐ I understand what I could do with my home's equity after selling
- ☐ I have reviewed what a smaller home would cost in my desired area

Monica says: If you checked 4 or more boxes in Section 1, your financial case for downsizing is strong. Turn to Chapter 7 of your book for the full equity strategy.

SECTION 2: PRACTICAL & PHYSICAL READINESS

- ☐ There are rooms in my home I rarely or never use
- ☐ Yard work, cleaning, and maintenance have become physically difficult
- ☐ I have deferred repairs or maintenance in the past 12 months
- ☐ Stairs, layout, or accessibility are a growing concern
- ☐ I have begun researching smaller home types (condos, townhomes, 55+ communities)
- ☐ I have visited at least one potential new community or neighborhood
- ☐ I have a rough idea of the square footage I actually need

Monica says: Practical readiness is often the first sign. When the house starts managing you instead of serving you, it's time to have the conversation. See Chapter 4.

SECTION 3: EMOTIONAL READINESS

- ☐ I can imagine being happy in a smaller, easier home
- ☐ I have talked openly with family about the possibility of moving
- ☐ I am ready to let go of items and spaces that no longer serve my daily life
- ☐ I feel more excited than fearful when I think about what's next
- ☐ I have given myself permission to prioritize my needs and comfort
- ☐ I understand that keeping memories doesn't require keeping everything

Monica says: Emotional readiness is the piece most people overlook - and the one that matters most. Chapter 3 of your book walks you through the Memory Box method to make letting go possible.

SECTION 4: LIFE ALIGNMENT

- ☐ My current home no longer matches the life I am actually living
- ☐ I want to live closer to family, friends, or activities that matter to me
- ☐ I see myself in a simpler, more manageable home within the next 1-3 years
- ☐ I am ready to invest time in planning my next move wisely
- ☐ I have read (or plan to read) Your Next Home: Smaller, Wiser, Happier by Monica Samuels

I have considered booking a free strategy call with Monica to discuss my options

YOUR READINESS SCORE

Count your checked boxes:

- | | |
|--------------------|--|
| 22-28 boxes | You are HIGHLY READY to act. Call Monica at 305-562-7980 today. |
| 15-21 boxes | You are SERIOUSLY CONSIDERING it. The timing feels right. Start with Chapter 2 of your book. |
| 8-14 boxes | You are ACTIVELY EXPLORING options. You are asking the right questions. Chapter 1 is your starting point. |
| 0-7 boxes | No pressure. You are in the CURIOUS STAGE . This guide will be here when the time is right. |

Ready to talk through your results?

Book a free 15-min strategy call: calendly.com/samuelsaisolutions/15min