CHARLOTTE WELLS
REAL ESTATE

Time to Downsize?

The Next Chapter, On Your Terms.

Your step-by-step guide to downsizing your home & upgrading your life.

Strategic Planning The Downsizing Timeline

The Downsizing Timeline

A Step-by-Step Roadmap to Your Next Chapter.

Downsizing isn't a single decision. It's a series of smaller steps spread over time. Rushing the process leads to regret, stress, and costly mistakes. Taking it slowly and intentionally leads to clarity and confidence.

12-18 Months Before Your Move

This is the thinking and planning phase. You're not making any major decisions yet, just gathering information.

- Start paying attention to how you actually use your home. Which rooms do you live in? Which ones do you avoid? Track this for a few weeks and you'll have real data instead of assumptions.

- Begin researching neighborhoods or communities that interest you. Drive through them at different times of day. Talk to people who live there. Get a feel for what's available in your price range.

- Have initial conversations with your financial advisor about how a move fits into your overall retirement plan. Understand the tax implications of selling your current home.

9-12 Months Before Your Move

This is when you start making preliminary decisions and tackling the biggest emotional hurdle: your belongings.

- Begin the sorting process one room at a time. Don't try to do everything at once. Start with the easiest spaces (guest rooms, storage areas) before moving to rooms with more sentimental items.

- Interview real estate agents who specialize in helping people downsize. The right agent understands this isn't just a transaction. Ask about their experience with clients in similar situations.

- Get a preliminary market analysis on your current home so you understand what you're working with financially.

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6-9 Months Before Your Move

Now you're building momentum and getting serious about execution.

- Continue sorting and begin actually removing items from your home. Host an estate sale, donate to charity, or give meaningful items to family members. The goal is to lighten the load before you list.

- Finalize your must-have list for your new home. How many bedrooms do you actually need? What accessibility features matter now or will matter in five years? What can you absolutely not live without?

- Start previewing homes in your target areas. You're not ready to buy yet, but you're educating yourself on what's realistic.

3-6 Months Before Your Move

This is the action phase. Decisions are being made and things are moving.

- List your current home or prepare it for listing. Your agent will guide you on timing based on your local market.

- Actively search for your new home. With your must-have list finalized and your belongings already reduced, you can evaluate properties clearly.

- Hire a senior move manager or professional organizer if you need support with the remaining sorting and packing.

1-3 Months Before Your Move

You're in the final stretch. The hard decisions are behind you.

- Finalize the sale of your current home and the purchase of your new one. Your agent will coordinate timing so you're not left without a place to live.

- Complete packing. At this point, you should only be moving items you've intentionally chosen to keep.

- Set up utilities, change your address, and handle the logistical details of the move.

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Move Week

Execute the move. Unpack intentionally. Give yourself grace as you adjust to your new space.

A Note on Timing

This timeline assumes you have the luxury of planning ahead. Not everyone does. Health changes, financial pressures, or family circumstances sometimes accelerate the process. If you're working with a compressed timeline, the same phases still apply. They just happen faster and require more support.

The most important thing is to start. Even if you're not ready to move for several years, beginning the sorting process now will make everything easier when the time comes.

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~Notes~

Let’s Connect

You don't need to have everything figured out. You just have to be willing to explore.

Maybe you're ready to move in six months. Maybe you're two years away and just starting to think about it. Maybe you picked up this guide because someone suggested it and you're not sure how you feel about any of this yet. Wherever you are in the process, I’m here.

Call, email, or reach out in whatever way feels most comfortable. We'll set up a time to talk through your situation and answer any questions you have. No pressure. No obligation. No sales pitch. Just a conversation about what's possible for you.

This is a big decision. You deserve a guide who understands that.

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