

Comprehensive Checklist for Selling a Home Before Transitioning to Assisted Living

1. Financial & Legal Preparations

- ✓ Review your mortgage status and any outstanding liens
- ✓ Gather important documents (deed, title, survey, property tax records, HOA info)
- ✓ Check for unpaid property taxes or assessments
- ✓ Consult with a financial advisor about proceeds from the sale
- ✓ Update or review estate planning documents if necessary

2. Decluttering & Downsizing

- ✓ Sort belongings into categories: keep, sell, donate, put in storage, or discard
- ✓ Remove personal items to make the home more neutral for buyers
- ✓ Arrange for a garage, estate sale, or donation pickup

3. Home Repairs & Maintenance

- ✓ Consider a pre-listing home inspection to identify necessary repairs
- ✓ Address minor issues (leaky faucets, squeaky doors, cracked tiles, peeling paint or caulking)
- ✓ Ensure all major systems (HVAC, plumbing, electrical, roof) are in good working order
- ✓ Clean or replace carpets and flooring if needed
- ✓ Touch up paint or repaint rooms in neutral colors
- ✓ Enhance curb appeal cleaning up landscaping, power washing, and exterior touch-ups

4. Staging & Presentation

- ✓ Deep clean the entire home, including windows, sills, kitchens, and bathrooms
- ✓ Depersonalize and declutter to create a welcoming space for buyers
- ✓ Arrange furniture to maximize space and natural light
- ✓ Consider fresh flowers, subtle decor, and inviting scents for showings
- ✓ Take professional listing photos and a virtual tour

5. Choosing a Real Estate Agent

- ✓ Research and select an agent experienced in transactions that require special attention
- ✓ Discuss pricing strategy and market conditions
- ✓ Customize a property specific marketing plan, including online advertising, and

social media

- ✓ Understand the listing agreement and contract terms

6. Preparing for Showings & Open Houses

- ✓ Secure valuables and important documents before showings
- ✓ Plan for a place to go during showings if still living in the home
- ✓ Keep the home clean and staged for last-minute showings

7. Packing & Moving Plans

- ✓ Arrange for moving assistance with a reputable company
- ✓ Set up storage solutions for items not going to the new home
- ✓ Notify important contacts of your upcoming move (utilities, mail, banks)
- ✓ Organize utilities shut-off when you have a scheduled closing date