Serve the Fastest-Growing Real Estate Demographic

From Dan Ihara

Dan Ihara is the founder of The Ihara Team at Keller Williams® Honolulu, specializing in senior relocation, legacy planning, and real estate wealth strategies (including 1031 exchanges, trust sales, and probate). With 20 years of experience and more than $1 billion in closed transactions, his suite of services guides older adults and their families through downsizing, moving, and estate planning with compassion.

Step 1: Learn Everything You Can About Senior Housing in Your Market

- Search the internet to collect and create a list of senior retirement communities and care homes in your market.
- Call the locations on your list and make appointments to tour the communities. During the tours, take notes:
  - How much does it cost?
  - What will life look like for a resident (meals, activities, events, etc.)?
- Identify which communities on your list will let you host a senior relocation seminar on their campus.

Step 2: Create a Senior Relocation Seminar

- Zoom is an OK option, but Dan recommends in-person events—they're more effective in building trust and setting appointments.
- Create an agenda:
  1. Ask Questions: Is your home too big now that the kids are gone? Do you have a bedroom downstairs? Do you have to walk upstairs often? Are you tired of cooking and cleaning? Is your home too much work to maintain? If you could move somewhere else, where would it be?
  2. Explain Two Types of People: Proactive and Reactive
  3. Show Options:
     1. Age in place with an in-home care budget.
     2. Move into a family member's home.
     3. Downsize to a smaller home.
     4. Move to a retirement community.
     5. Move to a care home.
  4. Schedule individual appointments. Be sure to ask who else should be invited (or not invited!).

Step 3: Send an email to your database and invite them to your senior relocation seminar.

- Dan reminds us that everyone has parents or knows someone in the retirement phase!

Step 4: Sign a Contract at the Appointment

- Prepare for the appointment by pulling the tax records, creating a CMA, and printing important documents.
- During the appointment, present a hard-copy calendar and write out the client's desired timeline. Indicate vendor needs and key events.
- Don't forget to ask about investment properties and be prepared to talk about capital gains tax.

Step 4: Add to CRM

- Set up a special touch plan for senior relocation clients. Dan's touch plans include:
  - How-to videos that explain each step of the sale process and are emailed to clients as they move through each phase.
  - Weekly emails about wealth tips, current listings, client reviews, and/or client success stories.

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