

Is it Time to Rightsize?



Rightsizing is a big decision as it closes one chapter and opens a new one.

This self-assessment is designed to help guide your decision as it encourages you to reflect on key areas of your life and home.

1. Emotion



- ☐ My house sometimes brings me feelings of stress
- ☐ I feel overwhelmed by maintaining this space as I get older
- ☐ I sometimes have feelings of loneliness and isolation

2. Money



- ☐ Housing expenses take up more than 30% of my monthly income
- ☐ Selling my home could give me the funds to support me during retirement
- ☐ Unexpected home repairs and rising costs cause a strain on my budget

3. Maintenance



- ☐ Home maintenance (yard work, cleaning, repairs, etc) is becoming harder
- ☐ The daily upkeep of my home takes a lot of my time and energy
- ☐ There are some large projects or repairs I've been putting off because they seem too overwhelming

4. Space and Stuff



- ☐ I have rooms in my house that I rarely use
- ☐ Many items in my home are things I no longer use
- ☐ A smaller home with a practical layout may better fit my needs

If you find yourself checking many of the circles, it might be time to consider rightsizing.

