

THE MOVING FORWARD GUIDE SERIES

THE SENIOR MOVE COMPANION WORKBOOK

A practical place to compare options, protect dignity, and plan the next right step

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<https://www.hoebeehomes.com/pages/senior-move-resources>

How to Use This Workbook

You do not need to complete every page in order. Begin with the question that feels most urgent, write what you know, and mark what still needs to be learned. Revisit the pages as circumstances change.

- ☐ Invite the older adult to lead whenever possible.
- ☐ Separate facts, feelings, and assumptions.
- ☐ Use pencil if the decision is still evolving.
- ☐ Bring completed pages to family and professional conversations.
- ☐ Choose one next step instead of trying to solve everything at once.

The decision we are trying to make is:

The person whose voice must remain at the center is:

1. The Present-Day Snapshot

Describe today before deciding what tomorrow should look like.

What is working well at home?

What has become difficult, unsafe, expensive, or isolating?

What changed recently?

What matters most to the homeowner right now?

What would make the next six months feel more manageable?

2. Stay-or-Move Decision Snapshot

Rate each area honestly. A low score does not automatically mean a move; it shows where support or more information may be needed.

Area	Working well	Needs support	Urgent concern	Notes
Personal safety	☐	☐	☐	
Mobility	☐	☐	☐	
Home maintenance	☐	☐	☐	
Transportation	☐	☐	☐	
Social connection	☐	☐	☐	
Health support	☐	☐	☐	
Monthly affordability	☐	☐	☐	
Family capacity	☐	☐	☐	
Homeowner preference	☐	☐	☐	

The strongest reason to stay is:

The strongest reason to consider a move is:

3. Home-Safety Walkthrough

Walk the normal routes through the home. Record what you observe rather than what you hope is true.

Area	Safe now	Improve	Professional review	Action
Exterior steps and railings	☐	☐	☐	
Lighting and entrances	☐	☐	☐	
Floors and trip hazards	☐	☐	☐	
Stairs	☐	☐	☐	
Bathroom	☐	☐	☐	
Bedroom	☐	☐	☐	
Kitchen	☐	☐	☐	
Smoke/CO detection	☐	☐	☐	
Emergency access	☐	☐	☐	
Medication storage	☐	☐	☐	

The first three safety changes we will make:

4. Monthly Cost Comparison

Compare complete monthly costs—not only the mortgage or rent.

Expense	Stay home	Option 2	Option 3
Mortgage/rent/community fee	\$	\$	\$
Property taxes	\$	\$	\$
Insurance	\$	\$	\$
Utilities	\$	\$	\$
Maintenance/repairs	\$	\$	\$
Transportation	\$	\$	\$
Home or personal care	\$	\$	\$
Meals/housekeeping	\$	\$	\$
Other	\$	\$	\$
TOTAL MONTHLY	\$	\$	\$

One-time costs and likely net proceeds to investigate:

5. What the Next Home Must Protect

Start with daily life and identity. The address comes later.

Priority	Must have	Would like	Not important	Notes
Close to family/friends	☐	☐	☐	
One-level living	☐	☐	☐	
Outdoor space	☐	☐	☐	
Pets	☐	☐	☐	
Privacy	☐	☐	☐	
Transportation	☐	☐	☐	
Activities/community	☐	☐	☐	
Care available later	☐	☐	☐	
Affordability	☐	☐	☐	
Familiar area	☐	☐	☐	

Three qualities that would make a new place feel like home:

6. Community Visit Scorecard

Complete one copy for every serious option and compare them side by side afterward.

Community / address / date visited:

Question	Rating 1-5	Notes
How welcome did I feel?		
Does daily life fit me?		
Location and transportation		
Home/unit comfort		
Safety and accessibility		
Activities and connection		
Food and services		
Staff responsiveness		
Financial clarity		
Future-care flexibility		

What felt better in person than on paper?

What concern should we investigate?

7. Family Conversation Planner

A calm conversation begins with permission, curiosity, and a clear purpose.

The purpose of this conversation is:

The best time and setting may be:

Who should attend—and who should not attend yet?

A respectful opening sentence:

Questions we want to ask, not answer for the homeowner:

What we agree to decide today:

What we agree to postpone:

8. Shared Family Fact Sheet

Write down the same facts for everyone. This reduces conflict created by different information.

Topic	What we know	What we need to learn	Person responsible	Due date
Health and mobility				
Home condition				
Monthly costs				
Legal authority				
Support schedule				
Housing options				
Sale preparation				

The homeowner’s stated preference is:

9. Professional Interview Notes

Use the same core questions with each professional so comparisons are fair.

Professional / company / role / date:

- ☐ What experience do you have with older adults and family transitions?
- ☐ How are fees calculated, and what could change them?
- ☐ What work will you personally perform?
- ☐ What protections do you use for privacy, valuables, and consent?
- ☐ What timeline is realistic?
- ☐ What should we decide before hiring you?
- ☐ May we contact references?

Notes and follow-up questions:

10. Downsizing Room Plan

Begin with an easier room and short sessions. Protect choice and stop before exhaustion.

Room / target date / people involved:

Item or category	Keep	Gift	Sell	Donate	Discard	Story/photo needed
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	

What would make this room feel complete—not perfect?

11. Home Preparation Decisions

Spend money only when the likely return, safety, or ease of sale justifies it.

Possible work	Estimated cost	Likely benefit	Do / Skip / Ask	Who owns task
Cleanout	\$			
Deep cleaning	\$			
Repairs	\$			
Painting	\$			
Flooring	\$			
Landscaping	\$			
Staging	\$			
Safety correction	\$			
Other	\$			

Homeowner priorities for the sale:

12. Moving Budget

Include the small costs that can quietly become a large surprise.

Expense	Estimate	Actual	Paid?	Notes
Mover	\$	\$	☐	
Packing help	\$	\$	☐	
Supplies	\$	\$	☐	
Storage	\$	\$	☐	
Travel	\$	\$	☐	
Cleaning	\$	\$	☐	
Repairs	\$	\$	☐	
New-home setup	\$	\$	☐	
Professional fees	\$	\$	☐	
Contingency	\$	\$	☐	

13. The 30/60/90-Day Transition Plan

Give the plan enough structure to move forward and enough breathing room to remain humane.

First 30 days

Stabilize, confirm safety, create one information file, and choose the next right step.

Action	Owner	Due date	Status
			☐
			☐
			☐
			☐
			☐

Days 31–60

Compare options, assign responsibilities, make financial and housing decisions.

Action	Owner	Due date	Status
			☐
			☐
			☐
			☐
			☐

Days 61–90

Prepare the home, organize the move, and build the support plan for after the transition.

Action	Owner	Due date	Status
			☐
			☐
			☐
			☐
			☐

14. Moving Week and First-Day Plan

Protect medication, documents, comfort, and calm before worrying about every box.

- ☐ First-day box packed
- ☐ Medication and medical information kept with the homeowner
- ☐ Important documents secured
- ☐ Utilities and access confirmed
- ☐ Furniture placement planned
- ☐ Transportation confirmed
- ☐ One calm point person assigned
- ☐ Food, bedding, toiletries, chargers, and pet supplies ready
- ☐ Goodbye ritual planned
- ☐ First-night support confirmed

Who will handle unexpected problems?

What will help the new place feel familiar immediately?

15. The First 90 Days After a Move

Adjustment is a process. Review the plan without treating every difficult day as proof the decision was wrong.

Review area	30 days	60 days	90 days	Action needed
Safety				
Comfort				
Health support				
Transportation				
Social connection				
Budget				
Family workload				
Sense of home				

What is improving?

What needs a different solution?

16. My Moving Forward Plan

A good decision protects dignity, safety, connection, and choice. It does not have to look perfect to anyone else.

The decision we are making:

Why this choice best fits the homeowner:

What must be protected:

The facts that support this decision:

The concerns we still need to monitor:

The people responsible for the next steps:

The next right step—and the date we will take it:

The date we will review the plan:

Important Contacts and Notes

Name / organization	Role	Phone	Email	Notes

Additional notes:

A Final Note from Denise

You do not need every answer today. You need a respectful process, reliable information, and one next step that protects the person at the center of the decision. Use these pages as often as you need, and allow the plan to change when life changes. Moving forward is not about leaving a life behind. It is about carrying what matters into what comes next.

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For educational purposes only. This workbook is not legal, medical, financial, tax, or mental-health advice.