



PLANNING YOUR NEXT CHAPTER

A Guide for Southeastern Wisconsin Homeowners

Thinking about downsizing - but not sure where to start?

You're not alone. Many homeowners begin thinking about this transition months or even years before they make a move.

The goal isn't to rush - it's to understand your options so you can make a good, informed decision when the time is right.

When Does Downsizing Make Sense?

Everyone's situation is different, but common reasons include:

- Home maintenance becoming more work than enjoyment
- Stairs or home layout is too difficult
- Desire to be closer to family
- Travel and flexibility become more important
- Wanting a simpler lifestyle

There's no "perfect time" - but planning ahead gives you more choices and control.

YOUR OPTIONS

Downsizing doesn't mean just one thing. Some common paths include:

Smaller Home or Condo



- Less maintenance
- Independent lifestyle
- Often lower upkeep costs

Senior Living Communities



- Social opportunities
- Maintenance-free living
- Additional support or care, as needed

Staying in Your Current Home



- Home modifications (main floor living, safety updates)
- Familiar surroundings
- Help with maintenance

DID YOU KNOW?

Many homeowners are surprised by how much equity they've built over the years. On average, homes in SE Wisconsin have risen from 70-100% over the past 10 years. Understanding your home's value can help you answer important questions:

- Can I afford a condo?
- What would senior living cost?
- How much would I have left after selling?
- Does downsizing make financial sense?



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What About Everything Inside the Home?

This is often the biggest concern - and completely normal

Most people approach it in stages:

1. Keep what matters most
2. Pass meaningful items to family
3. Donate, sell, or simplify the rest



*We can connect you with
trusted local resources
to make this easy -
you **DON'T** need to
do it yourself!*

When Should You Start Planning?

Most successful transitions begin 6-12 months before moving

Why? Less stress, more time to make decisions, better financial outcomes, and more flexibility in timing

A Simple Step-By-Step Approach

1. Start the conversation (even if you're not quite ready)
2. Understand your home value
3. Explore your options
4. Create a flexible plan and timeline
5. Move when the timing feels right

Planning Ahead Starts with a Conversation

If you're even thinking about downsizing, we're happy to talk you through your situation. No pressure, no obligation. Our role is to guide you - not pressure you.

Why Families Choose to Work with Mike & Julie:

- **Trusted** by hundreds of SE WI families
- Decades of **experience** in buying, selling, investing and renovations
- **Patient**, no pressure guidance
- Local **specialists** who understand today's market
- Have a vetted list of reliable **contractors** to help with any issue, as needed
- A **personalized plan** for your family's goals

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