Your Real Estate and Lifestyle

PLANNING WORKBOOK

BERKSHIRE HATHAWAY HOMESERVICES | COLORADO REAL ESTATE

Real Estate's **FOREVER** Brand℠

Journaling for the mind is what rearranging furniture is for your living room.

Your Berkshire Hathaway HomeServices Real Estate and Lifestyle Planning Guide will:

- Help you establish your lifestyle and real estate priorities
- Create a strategy for increasing the worth of your present and future property
- Formulate a real estate action plan

This document is meant as a supplement to help guide your real estate and lifestyle planning. It should always be used in conjunction with comprehensive, experience-driven consultation and advice from your Berkshire Hathaway HomeServices network Forever Agent℠.

Introduction

Dear Valued Client,

The Berkshire Hathaway HomeServices Real Estate and Lifestyle Planning Workbook was designed to complement the Real Estate and Lifestyle Planning Guide. As you read through the guide, the workbook will add even more personalization to this process, allowing us to analyze and organize your plan together.

Each question is meant to make you think about your lifestyle and real estate preferences, and each answer is an opportunity to assess what priorities matter most to you.

Ready to start planning for your future? Let's begin!

There are three steps in the Berkshire Hathaway HomeServices Real Estate and Lifestyle Planning process:

STEP 1

Identify Current and Future Lifestyle Needs

STEP 2

Review Lifestyle Choices and Options

STEP 3

Formulate Real Estate and Lifestyle Goals

STEP 1 Identify Current and Future Lifestyle Needs



A real estate dream becomes a reality when you look at a house and immediately feel like it's your home.

PRIORITIES

List the five most important factors you want or need in your home:

No. 1: _____

No. 2: _____

No. 3: _____

No. 4: _____

No. 5: _____

RENTING VS. BUYING

Is renting or buying right for you? Answer the following questions to begin to determine your best next step:

1. Would a down payment for a home represent a financial strain or is it simply not possible at this time? _____

2. Do you plan on living in a home for less than three years? ☐ YES ☐ NO

3. Based on price trends, overall demand for the area and the price range you are considering, is your property more likely to go down in value for the foreseeable future than to increase? (Don't worry if you can't answer this question – we can discuss price trends, buyer demand and price range together!) _____

4. Is it important that you personalize your space? _____

5. Is it important that you and/or your family begin building long-term wealth? _____

6. Is building a strong credit score through monthly mortgage payments important to you? ☐ YES ☐ NO

7. Do you plan to use the equity from your next home to open a line of credit to finance another property? ☐ YES ☐ NO

8. Are you worried about rising rental prices in your market? (Again, we can discuss rental price trends together!) _____

A Forever Agent℠ understands your homeownership dreams and helps you make them real.

HOMEOWNERSHIP GOALS

To get you to start thinking about your ideal home, here are some potential goals you might have for your first or next property:

- ☐ Near shops, restaurants and other amenities
- ☐ Close to family and friends
- ☐ Close to the water
- ☐ Big backyard or expansive yard space
- ☐ A diverse community

Now close your eyes. Envision your ideal home. What does it look like? What color is the door? What does the landscaping look like in the front yard? What kind of neighborhood is it located in? What architectural style is it? How high are the ceilings in the living room? Get specific about your home and write down exactly what you see in your mind.

Define what the word "homeownership" means for you.



If the wallpaper doesn't work—change it. Stripes, florals, bold or bright … Your home is whatever you want it to be.

If a move or real estate purchase is in your near future, continue with the next planning exercise before returning to your guide.

Check the boxes to complete this section:

TYPE OF HOME I'M LOOKING FOR:

- ☐ Single family
- ☐ Townhome
- ☐ Vacation home
- ☐ Land
- ☐ Investment property
- ☐ Other: _____

If a move or real estate purchase is in your near future, continue with the next planning exercise before returning to your guide.

Check the boxes to complete this section:

IDEAL SQUARE FOOTAGE:

- ☐ Under 1,500 sq. ft.
- ☐ 1,500 to 3,000 sq. ft.
- ☐ 3,500 to 6,000 sq. ft.
- ☐ Over 6,000 sq. ft.

LAYOUT:

- ☐ Open Floor Plan
- ☐ Traditional
- ☐ Indoor/Outdoor Space
- ☐ _____# Bedrooms
- ☐ _____# Bathrooms

REQUIRED ROOMS/ROOM FEATURES:

- ☐ Separate Family Room
- ☐ Primary Room
- ☐ Ensuite Bathroom
- ☐ Walk-in Closets
- ☐ Combined Family/Kitchen Area
- ☐ Living Room
- ☐ Den
- ☐ Home Office
- ☐ Children's Playroom
- ☐ Guest Room
- ☐ Game/Media Room
- ☐ Detached Guest Room/ADU
- ☐ Exercise Space
- ☐ Pet Room

ADDITIONAL HOME FEATURES:

- ☐ Smart appliances and smart features
- ☐ Solar panels
- ☐ Fireplace
- ☐ Balconies/Patios
- ☐ Outdoor Decking
- ☐ Pool
- ☐ Hot Tub
- ☐ Sauna
- ☐ Outdoor Kitchen
- ☐ Exterior Hardscaping
- ☐ Landscaped Yards

NEIGHBORHOOD AMENITIES:

- ☐ Great School System
- ☐ Quality Healthcare
- ☐ Jogging/Cycling Paths
- ☐ Parks, Plazas and/or Green Space
- ☐ Public Sports Fields
- ☐ Near Shops and Boutiques
- ☐ Sailing
- ☐ Tennis
- ☐ Golf
- ☐ Historic District
- ☐ Nightlife and Entertainment
- ☐ Fine Dining
- ☐ Community Pool
- ☐ Community Golf Course
- ☐ Music Venues and Performing Arts
- ☐ House of Worship
- ☐ Public Transportation
- ☐ Proximity to Airports
- ☐ Community Events

NEIGHBORHOOD VIBE:

- ☐ Tranquil and Serene
- ☐ Always Buzzing
- ☐ Family-Friendly

STEP 2 Review Lifestyle Choices and Options

A house is refuge, safety and comfort. A home is the feeling of being completely, unapologetically yourself.

THINKING ABOUT RIGHTSIZING?

Let's figure out if that's the right move! Select any or all of the following reasons to rightsize that might be applicable to you:

- ☐ Lower maintenance costs
- ☐ Cash in home equity
- ☐ Increase walkability
- ☐ Increase transportation efficiency
- ☐ Reduce cleaning time and effort
- ☐ Retire or prepare for retirement
- ☐ Live closer to family
- ☐ Reduce taxes
- ☐ Address health care and or/ mobility concerns
- ☐ Desire to join a more active community
- ☐ Improve resources for children
- ☐ Improve resources for pets
- ☐ Drive less
- ☐ Move closer to work
- ☐ Experience greater diversity

Maybe rightsizing isn't right for you. Instead, maybe you want to stay right where you are … at least for now. Before we get into any improvements you might make in your home, answer the following question: I want to remodel my home to make it more …

+ Comfortable and convenient for me.	☐ YES	☐ NO
+ Appealing for a future buyer.	☐ YES	☐ NO
+ Valuable when pricing my home for sale.	☐ YES	☐ NO
+ Reflective of modern home trends and styles.	☐ YES	☐ NO
+ Aligned with my lifestyle.	☐ YES	☐ NO

If you're living in a multigenerational home, continue on with the following questions about reasons to remodel your current property:

+ Comfortable and convenient for members of the family.	☐ YES	☐ NO
+ Functional for senior members of the family living in the household.	☐ YES	☐ NO
+ Functional for children living in the household.	☐ YES	☐ NO

If comfort or convenience are priorities in your home, describe what's NOT comfortable in your home right now. Then, describe what you'd like to do to fix it. (If this isn't your goal, and you're making return-on-investment-related fixes instead, skip to the next set of questions).

Not working: _____

_____

_____

Desired fixes: _____

_____

_____

If you're updating your home to increase its potential resale value, check the top THREE return-on-investment-generating projects that most appeal to you. If you're NOT updating for resale value, you can skip this section.

- ☐ Wood decking
- ☐ Kitchen remodel (minor or major)
- ☐ Window replacement
- ☐ Garage door replacement
- ☐ Entry door replacement
- ☐ New roof
- ☐ Primary suite remodel
- ☐ Bathroom remodel
- ☐ Updated HVAC system
- ☐ Fresh landscaping
- ☐ Other: _____

Of the three selected above, think about your No. 1 most important remodeling project—the one that we'll not only be able to showcase in the future sale of your home but also the improvement that you'll enjoy **most** right now:

Top project: _____

_____

Now imagine that project is complete. A wave of a magic, home-improvement wand and you now have a brand-new kitchen for (finally!) baking sourdough bread or fresh landscaping where you can relax and read a book on warm evenings. Spend a few minutes writing down how you'll use that home update now:

_____

_____

_____

_____

REAL ESTATE INVESTING

Are you interested in investing in real estate? First, let's determine your immediate investment goal. Check any and all that may apply:

☐ Vacation home ☐ Second home ☐ Long-term rental property ☐ Short-term rental property

If you're looking for a vacation home or second home, describe what that ideal property would be for you, otherwise skip to the next question:

If you're looking for a long-term rental property, describe what that ideal property would look like and be specific! How many bedrooms, bathrooms? Where is it located? What will the decor be like?

If you're looking for a short-term rental, describe what the property would look like and how you'd promote it.

+ Will you use a platform like Airbnb or Vrbo? ☐ YES ☐ NO
+ Will you work with a property management company? (Ask me about the property management companies I like best!) ☐ YES ☐ NO
+ Will you hire someone to remodel the property, if necessary? ☐ YES ☐ NO
+ Will you hire an interior designer? ☐ YES ☐ NO
+ Decorate on your own from that "Dream Rental Property" Pinterest board you created? ☐ YES ☐ NO

Please elaborate: _____

Formulate Real Estate and Lifestyle Goals

STEP 3

Plant a garden and it will grow. Imagine your real estate future and it will flourish into the home you've always seen.

Now that you've thought about the specifics of your lifestyle and planning, it's time to zoom out and look at the big picture. These exercises are meant to get you thinking about those large, important goals you want to achieve.

One year from now, I see myself living in _____

_____

_____

Five years from now, I see myself living in _____

_____

_____

Ten years from now, I see myself living in _____

_____

_____

Holidays with family, planting a backyard garden, redecorating a dining room, what are your top 3 favorite memories of home?

1. _____
2. _____
3. _____

Three words I would use to describe my future home:

1. _____
2. _____
3. _____

My dream home would look like: _____

_____

_____

If I'm not already, THIS is what I believe is stopping me from living in my dream home now:

_____

_____

What I'm going to do to remove that obstacle: _____

_____

_____

When I think about my real estate and lifestyle planning goals, here's what I'd like my Forever Agent℠ to help me achieve:

_____

_____

_____

And yes, I am here to help you achieve your dreams! Your final exercise now that you've completed the workbook is to set up a meeting with me to start formulating your exact real estate and lifestyle plan:



John Paul Davis
Licensed Real Estate Broker
(720) 710.3506
johnpaul@newbeginnings-consulting.net
johnPaulDavis.bhhscore.co/
CO Lic #: FA.100096946

Berkshire Hathaway HomeServices Colorado Real Estate • 2660 East County Line Road Suite E Highlands Ranch, CO 80126
(303) 289-7009 • https://www.bhhs.com/colorado-real-estate-co308

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