

5 BIGGEST MISTAKES FAMILIES MAKE WHEN DOWNSIZING OR DEALING WITH AN ESTATE

So you are considering downsizing, or you must downsize because life has thrown you a curveball. There are a million things to do, you have limited experience with this type of move (yes, it's a very different type of move), everyone in the family is emotionally charged with an opinion, and timing matters! How do you begin so you are not regretting what you started 2 days ago? A step-by-step approach will save you time, money and most importantly, help you avoid the family arguments and chaos that come with the territory. There is a "better way" of doing things and the order of action can be critical.

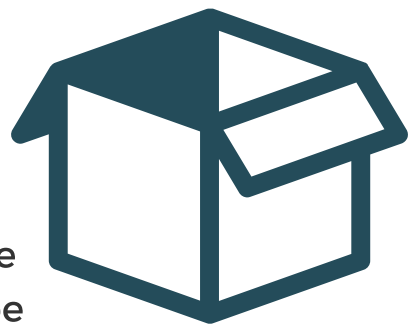


DON'T WAIT TO CALL FOR HELP

Call the minute you start considering the move. The earlier in the process you speak with a knowledgeable professional, the faster you'll learn about solutions you didn't even know existed. In fact, they will provide you with great questions & important items to consider that will likely guide your initial conversations.

DON'T 'DIVE IN' AND BEGIN DEALING WITH PERSONAL POSSESSIONS

Too often we see the family immediately converge on the home and begin prepping the home & dealing with the 'stuff'. They begin to sort through possessions, make calls to get stuff sold or removed, try to guess which deferred home maintenance items they should do, and more. They do all this because they assume, they'll have to do all this work anyway, but they're often wrong. Today, there are many turnkey services that will handle every aspect of the downsizing process - affordable too when you consider the total hours involved. Make a call and create a plan. It will be worth your time.



DON'T BE AFRAID TO ASK FOR ALTERNATIVE SOLUTIONS TO SELLING YOUR HOME

Your priorities are different from everyone else, so ask for a solution that fits your needs. Many sellers don't benefit from the traditional method of 'sign in the yard' home sale so explore your options -real estate creativity has come a long way.

Some ideas are:

- a. Quick cash sale options that don't require an appraisal or inspection
- b. Buy & lease back options
- c. Auction the home
- d. Short-term bridge loans that help pay for the transition into a senior living community



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DON'T HIRE A GENERIC REAL ESTATE AGENT

DO hire an agent that has extensive experience serving senior age clients where their business is focused on representing sellers, not buyers. Not all licensed agents are the same & representing a client when buying vs. selling a home requires a different set of skills & systems. You want an agent with excellent marketing & negotiation skills that has experience protecting the equity of senior age sellers & their family. An agent that also understands trusts, POA's, guardianships & the entire senior housing space is also a big plus. Ask your agent to provide 2-3 client referrals you can speak with that verify what you're looking for.



DON'T BE TOO PROUD OR INDEPENDENT TO ASK FOR HELP



Often times we hear the senior age client say, "I can handle this because I've done it before.". Believe us, this time it's different! This type of move becomes exponentially more difficult when the reason is: declining health, the death of a loved one, financial challenges, inability to 'keep up' the home, medical diagnosis, and more. It's difficult because emotions are running high, and that affects everything. Loving parents that don't want to burden their children combined with dutiful children that want to do the right thing, but might still be raising their own kids, can make for a bad combination. Independently stubborn parents don't make it easy either.



NO MATTER YOUR FAMILY SITUATION, YOU DON'T HAVE TO DO IT ALL!
ASK FOR HELP.
THE EARLIER THE BETTER.

WE HELP STRESSED-OUT PARENTS OR GRANDPARENTS MANAGE THE CHAOS OF DOWNSIZING WITH OUR SIMPLE 3-STEP PLAN, SO YOU CAN MOVE FORWARD WITHOUT FEARING THE UNKNOWN.