1. When do you want to be absolutely done with the move? \_\_\_\_\_\_\_\_\_Month \_\_\_\_\_\_\_ Year
2. Explore your options:
   * What will be your monthly budget for paying rent? (*Try to pay no more than 30% of your income on housing related costs)*
   * List your top 4 preferred towns/neighborhoods:

* + What will you need in terms of space needs/requirements for bedrooms/dens, storage, parking, and other amenities:
* BR:
* Bath:
* Pkg:
* EIK:
* Other:
  + List the housing stock available and of interest to you in the preferred areas:

Name of Site/Street When Likely Available:

1. If you own a home which you will sell, do you know (approximately) what it will sell for? The answer will help you determine what rent you can comfortably afford.

**Preparing Yourself to Move to the New Space –**

1. Room by Room, decide what belongings you wish to keep and therefore, by the process of elimination, which you will shed and not bring to the new space. Use the **Personal Action Plan** attached to organize the sorting, recycling, donating and keeping tasks.
2. Would you sell the house/condo that you own by yourself or hire a realtor? If you decide to hire a realtor, do you know several whom you would like to call and interview before selecting one?
   * Realtor #1 Telephone:

Appointment Date/Time:

* + Realtor #1 Telephone:

Appointment Date/Time:

* + Realtor #1 Telephone:

Appointment Date/Time:

Questions for the Realtor:

1. What do you advise that I do to stage the home for a quick sale at a good price?
2. What price do you think this property will sell for?
3. How long do you think it will take to sell it?
4. What is your standard commission?
5. Who of your friends and/or family might you ask for help in staging the house and shedding your extra belongings?
6. Plan for when to both apply to landlord/housing manager of the new apartment you have selected (or purchase a new property) while at same time managing the sale of your current home (or giving timely notice to current landlord.)
   * Date to Give Notice \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or Target Date for Sale: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Recommended Date for Applying for New Apartment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. Hire movers; move into new home.
   * Call 3 moving companies to get price quote and confirm availability:
   * Company #1 Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Price Quote:

* + Company #2 Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Price Quote:

* + Company #3 Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Price Quote:

**Notes**

**Personal Action Plan for Shedding Excess Belongings**

**Timetable and Sequenced Action Plan**

1. List the furniture pieces and accessories (lamps, rugs, etc.) your anticipate needing in/wanting to bring to the new space
2. List the furniture pieces you want to bring with you to the new space
3. Identify new items you will want to or need to buy for the new space

The list should look like this:

|  |  |  |  |
| --- | --- | --- | --- |
| New Place Room | Item of Furniture / Accessories | Bring With Me | Buy New |
| *Bedroom* | *Frame/mattress/tall bureau/2 side tables/lamps* | *XX* |  |
| *Bedroom* | *Rug* |  | *XX* |
| LR |  |  |  |
| DR |  |  |  |

1. On the same list, also identify all the art works from the walls and other curios you want to bring with you to the new space. Later, you will be able to quickly box up all the other items to give as gifts to friends/family, or to sell, or to donate to charity.
2. List all the kitchen appliances, pots, pans, and special serving plates you will need in the new space.
3. Next, gather together all your books and decide which you will bring and which you will donate.
4. Then, gather together all your hobby supplies – throw out what is no longer useful, and figure out how you will want to store the supplies in the new space. Purchase new sealed containers, as needed, and move the supplies into their new space efficient containers.
5. Next, gather together all your financial documents and decide which are active and necessary to keep, and then rent, borrow or buy a shredder and shred the rest of them.
6. Gather together all of your photographs; decide which to keep and win that way (e.g. in a book, or via converting many into digital photo files)
7. Then, gather together all of your clothes and pick out the ones you like to wear versus the ones you seldom or never wear. Put the clothes you will no longer wear into bags and donate to a charity via large collection boxes positioned throughout your town.
8. Finally, sort through all of your kitchen drawers, cabinets and household closets for all your cooking, baking, and household maintenance tools. Decide which you will need in the new space and offer the rest to neighbors, friends, family members, or hold a yard sale, or donate to charity. Do the same with the home repair tools (paint brushes, screwdrivers, rakes, hoses, etc.) in the garage and basement.
9. Hire the movers when the new space is ready for you.
10. Arrange to have all of your mail forwarded to the new address.
11. Send out “I’ve Moved” postcards and emails to friends and acquaintances.
12. Buy yourself some flowers for your new space!

**You’ve made the move!! Congratulations to you and your team of professionals and helpers!!**