



# 10 STEP CHECKLIST FOR A SMOOTH TRANSITION TO RETIREMENT LIVING



## 1. START THE CONVERSATION

Avoidance is the enemy – you need to start somewhere. Expect that family may be surprised as this is the family home you may be transitioning from. These conversations should start now, as decisions based on rational thinking and planning are typically sounder than those based on emotion and last-minute panic.

## 2. ASSEMBLE A TEAM

Involve the immediate family, friends, a bank manager or financial advisor and an estate planner/solicitor, depending on the situation and get the right advice regarding your financial situation.

## 3. TIMING IS EVERYTHING

Signs the time to move is right can include feeling the garden is too big to take care of, swimming pool maintenance is too much or struggling to keep up with household maintenance. Empty rooms that are not used anymore. Concerns that your house has stairs and mobility issues for future years. Desire to lock up and leave and travel without the worry about your house. Or perhaps you have had some health issues of late.

## 4. RESEARCH IS KEY

Search the internet for retirement living in the areas you would be happy to move to. Speak to friends that have moved into retirement living and ask them for their experience and tips. Read the local papers and look for open days and any advertising on retirement living developments. Make a wish list of your future requirements and have a checklist when researching. Some suggested checklist questions: what social activities will be on offer, will my home be safe when I go on holidays, what facilities are available, can family and friends visit and use communal areas, are pets welcome, what are the monthly fees, what extra services are available, what if my care needs change, what about storage?

## 5. SEEK HELP AND EXPERT FINANCIAL ADVICE

Ensure you speak to a qualified financial advisor, many specialise in retirement and can help you work out your future finances.

## 6. GET OUT AND ABOUT

Don't be shy, get out and about and visit locations you have researched, many retirement villages will have open days or information sessions that you can go along to. Some may require an appointment but many you can drop in for a tour.

## 7. GET YOUR HOUSE MARKET READY

Start by obtaining a few appraisals from local Real Estate Agents, this way you will get a better feeling for which Real Estate Agent is right for you. Often the retirement living you have chosen can recommend an agent that they have worked with. A good Real Estate Agent will suggest ways to make your home more attractive to prospective buyers. Decluttering, small paint jobs and garden clean ups are a good way of refreshing your house before it goes to market. You may need to tidy up wardrobes and kitchen cupboards, dispose of unwanted items, either by selling them or donating them.

## 8. WHAT WILL WE TAKE?

Ensure you only take what you really will need now that you are downsizing, ask yourself realistic questions e.g. will I still need a 10 seat dining table. Take only take a few loved pieces.

## 9. SERVICE OFFERINGS NOW AND FUTURE

Make sure the retirement living chosen includes service offerings that will increase as you age allowing you to stay in your home longer, such as availability of home care or residential aged care.

## 10. RETIREMENT IS THE TIME IN YOUR LIFE THAT SHOULD BE ENJOYED TO THE FULLEST!

Only you can decide when the time is right for you to move – but don't wait too long!

OPEN FOR INSPECTION

**No appointment needed**

Tuesdays 10am – 12 noon  
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