



Guiding you in all of your real estate needs

Am I ready to move?

A Guidebook to taking the next steps

Welcome

Residential real estate is both financial and emotional. There can be a myriad of emotions—uncertainty, excitement, sadness, happiness, energy, and exhaustion.

It helps to have a plan.

- What is the timeline?
- Who is going to help me physically and emotionally (*e.g. family, friends, church group, etc.*)?
- What repairs will be needed for my current property?
- Do I have multiple properties that need to be sold?
- What do I need to do from a financial planning perspective?
And what could be the tax implications?
- Do I know where I am going next?

We are here to help you through this process from start to finish and all points in between.

When selling a property, there can be much more going on than just selling the property itself—there are various aspects to coordinate.



Guide to Downsize

Assess Future Needs of Belongings

- Will it fit in the new space? *Measure furniture to make sure it will fit in the new space*
- Will you need the lawn mower anymore?

Sort Belongings Into Categories

- Keep
- Maybe (*keep and decide later*)
- Sell (*at auction, estate sale, yard sale*)
- Give Away (*to family members or friends*)
- Donate (*to charitable organizations*)
- Throw Out (*Resist the “maybe I will need it mindset.” Consider if it is worth the cost and effort to pack, move, and unpack*)

Helpful Hints/Reminders:

Start early—the process can take a while.

Try taking care of a room/project one at a time.

Give yourself grace in the process. It is emotional, and it takes a lot of energy.

Keep the end in mind: The process is painful, but you will feel relief.

How to Prepare for Listing

- Take furniture down to a minimum
- Clear pathways to walk through the house
- Replace burned out light bulbs using all the same color
- Minimize personal photos throughout the house
- De-clutter closets, kitchen cabinets, countertops, and refrigerator
- Wipe up the stove and clean out the inside
- Ensure windows and ceiling fans are clean
- Straighten up the garage and/or shed
- Clean walls and doors. Touch-up with paint if needed



Helpful Checklist

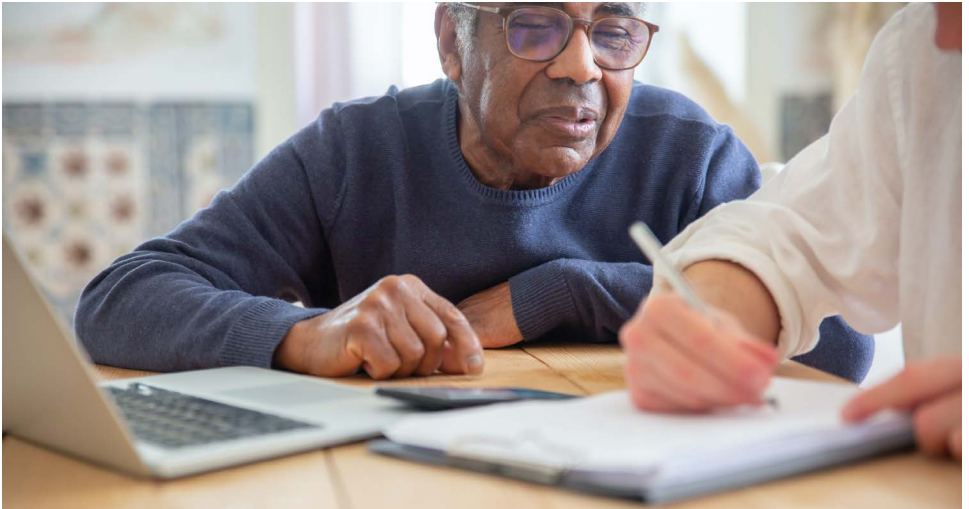
- Notify all physicians of relocation (*if moving out of the area*)
- Separate out the valuables you will transport yourself (*versus the mover*)
- Verify utilities at the new location (*as applicable*)
- Print new checks with new address

Notify following of change of address:

- USPS
- Credit Card Companies
- State/Federal Tax Bureau
- Insurance
- Social Security Administration
- Pharmacy/Prescription Delivery
- Bank
- State Vehicle Registration
- Magazine/Newspaper Subscriptions

Schedule Disconnect of:

- Phone (*if home phone*)
- Internet
- Cable
- Water
- Garbage
- Gas/Electric



Resources

- **Elder Law Attorney**
Britton Swank
Swankelderlaw.com
239-208-3040
- **Financial Planner**
Laurie Moore
239-432-5262
- **Accountant**
BriersCPA
www.brierscpa.com
239-390-8882
- **Estate Sale**
Blue Moon Estate Sales
239-464-0833
- **Insurance Agency**
Sutton & Assoc for
Personal
239-283-3333
- **Contractors**
Gatewood Custom
Carpentry
239-283-9663
- **Moving Companies**
Two Men and a Truck
239-221-0114
- **Carpet Cleaning**
Captain Steamer
239-275-8120
- **Housecleaning**
Crystal Clean
239-936-7700
- **De-clutter**
Clean Up with Cal
(239) 293-4826
- **Landscaping**
Weeks Landscaping
239-936-2456
- **Surveyor**
FLA Surveys Corp
239-370-1900
- **Local Charities**
St. Matthew's
House
239-774-3315
- **Banking/Lending**
Mike Hartman
Sanibel Captiva
Community Bank
239-274-6224
Edison National
Bank
239-466-1800
Finemark National
Bank
239-461-5900
- **Scanning Services**
*(e.g. scanning of old
photographs)*
Creative Photo
239-433-4676



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New to Florida?

We love to provide helpful information related to any (*but not limited to*) the following categories. Since it can be more specific for each person, we enjoy hearing from you on what you care about and tailoring our recommendations specifically for your needs and wants.

- Churches
- Education
- Volunteer Opportunities
- Employment
- Hobby Groups
- Community Events
- Restaurants
- Groceries
- Pharmacies, Delivery Services
- Auto Care
- Veterinarian
- Transportation Services
- Occupational Therapy for Driving
- Hospitals, Rehab Facilities
- Home Health Care
- Personal Care (*e.g. hair stylists*)
- Cultural and Entertainment Venues (*theaters, art galleries, museums*)
- Libraries/Bookstores



Meet Your Agent **Matt Gatewood**



Matt Gatewood
Principal Broker

Matt grew up around property and home improvement projects thanks to his father, who was a carpenter.

His grandfather was also a carpenter, builder, and real estate agent, so putting people in homes they're proud of runs in his blood.

He has his Senior Real Estate Specialist® (SRES) designation to help with your specific needs. Matt is married and has two boys.

He enjoys reading a good book, playing ice hockey, and talking cars.



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