



*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

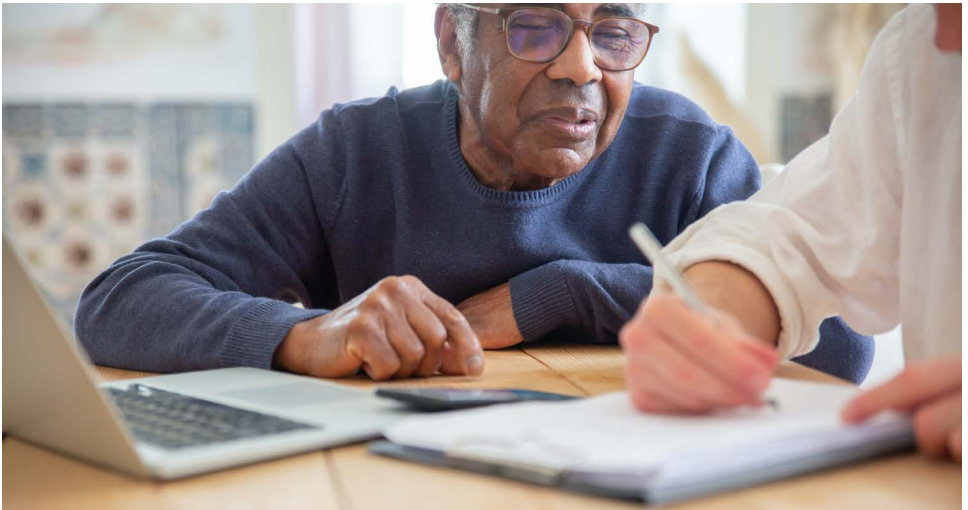
- Notify all physicians of relocation (*if moving out of the area*)
  - Separate out the valuables you will transport yourself (*versus the mover*)
  - Verify utilities at the new location (*as applicable*)
  - Print new checks with new address
- 

## 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**  
John Johanboeke  
502-491-0600
- **Financial Planner**  
Joe Cooper  
502-426-6577
- **Accountant**  
Hemingway and  
Travelstead  
502-968-1892
- **Estate Sale**  
Sean McBride  
502-807-2706
- **Insurance Agency**  
Stephen Cohn  
502-807-3761
- **Contractors**  
Daniel Ramirez  
502-741-8809  
Charlie Thomas  
502-807-6607
- **Moving Companies**  
Cardinal Moving  
502-599-2661
- **Carpet/Duct Cleaning**  
Technicare  
502-762-9966
- **Housecleaning**  
Kelley Hughes  
502-919-3694  
Steve Duvall  
502-741-2347
- **De-clutter**  
Simplicity and Style  
502-657-9951
- **Landscaping**  
Dan Dively  
502-649-3894
- **Banking**  
River City Bank  
Logan Raley  
502-231-7700
- **Cross Country Mortgage**  
Robert Clifton  
502-253-9704
- **Local Charities**  
LifeBridge Warehouse  
<https://www.southeastchristian.org/stories/lifebridge/>  
God's Designs, Inc.  
502-494-1089
- **Scanning Services**  
*(e.g. scanning of old photographs)*  
The Print Refinery  
502-339-1999
- **Grief Counseling**  
Kassel & Associates  
502-339-4511
- **Surveyor**  
Wes Barber  
502-744-5772



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# New to Louisville?

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 Gatewood grew up in Louisville, KY. Thanks to his carpenter father, Matt found himself around property and home improvement projects often as a youth.

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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