

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

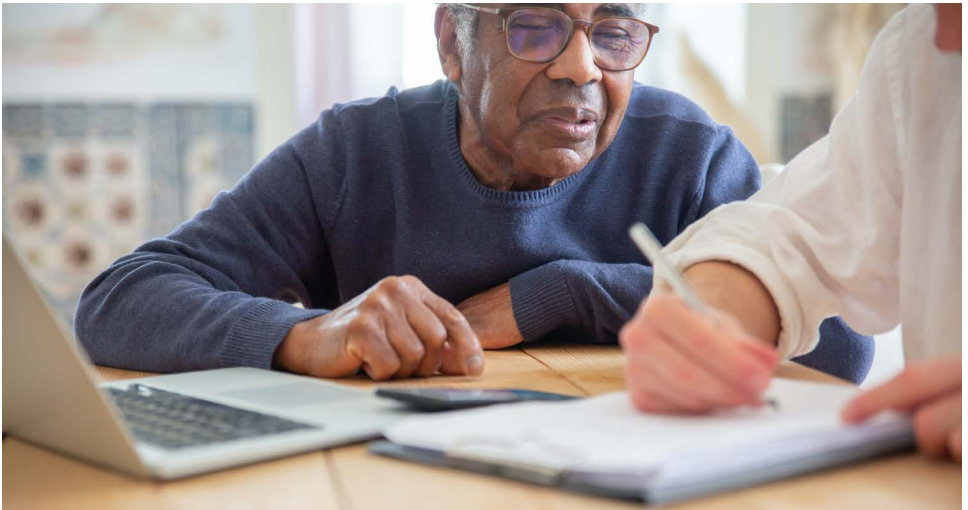
- Notify all physicians of relocation (*if moving out of the area*)
 - Separate out the valuables you will transport yourself (*versus the mover*)
 - Verify utilities at the new location (*as applicable*)
 - Print new checks with new address
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Notify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





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