



**BERKSHIRE  
HATHAWAY**  
HomeServices  
California Realty

## About the Berkshire Hathaway HomeServices Network

Real estate agents often claim they would like to be your real estate agent for life. Unfortunately, there is rarely a defined service other than being involved when you buy and sell real estate.

As a Berkshire Hathaway HomeServices network Forever Agent I am committed to providing my clients with a lifetime of value which includes relevant resources and tools like the real estate lifestyle planning guide that can assist you in developing real estate and lifestyle-related strategies.

I look forward to earning your respect as your real estate trusted advisor or as we say at Berkshire Hathaway HomeServices... your network Forever Agent<sup>SM</sup>



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**LUXURY  
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**TRUST - EXPERIENCE - INTEGRITY**

**\*Berkshire Hathaway HomeServices California Realty No. 1 Agent in Sales Production in Ventura County**

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When it's time to downsize



**BERKSHIRE HATHAWAY**  
HomeServices

REAL ESTATE'S **FOREVER BRAND**



Each year, millions of homeowners are faced with the decision to continue living in their present home or downsize—as some say, “right-size.”

The purpose of this guide is to provide you with a more strategic approach to making this important lifestyle-related decision.

As a Berkshire Hathaway HomeServices network Forever Agent, we are quick to point out that each person, couple or family represents a different set of circumstances and lifestyle objectives. That said, there are common decisions facing all who want to make the best choices regarding changing from a larger to a smaller home.

While the importance of location is resoundingly referred to by real estate professionals, buyers, and sellers of real estate alike, not enough attention is given to timing. When is the right time for you to downsize? And where do you think the best and most desirable and attainable location might be?

## DETERMINE YOUR NEEDS

To help you determine the right time, place and type of real estate/lifestyle, we encourage you to consider which of the following lifestyle factors play an important role in your decision to downsize:

- Lower maintenance costs
- Cash-in-home equity
- Increased walkability
- Improved ecological footprint
- Increased transportation efficiency
- Reduced cleaning time and effort
- Retirement or preparation for retirement
- Proximity to children or grandchildren
- Reduced taxes
- An opportunity to declutter
- Health care and/or mobility
- An active community
- Change
- Proximity to services
- Proximity to recreational activities
- Improved resources for pets
- Less driving
- Proximity to work
- Greater diversity
- Safety

## BENEFITS

There are many factors to consider when downsizing and the importance of each may differ from person to person.

Berkshire Hathaway HomeServices network agents have learned that many individuals, couples and even some families feel a sense of freedom after downsizing or right-sizing. In many cases for the first time in years, they are free from long commutes, burdensome levels of maintenance, high taxes and excessive dependence on their automobiles. Moreover, many who downsize also find that their lifestyle enlarges substantially as they become more involved in the community. This joy is due to additional convenience and their freedom from housing maintenance.

A special thank you to Allan Dalton for his creative vision and contribution to the Berkshire Hathaway HomeServices real estate and lifestyle brochures.

# Lifestyle advice when contemplating downsizing

- + In most cases, do not rent or buy your next home until your present home is under contract.
- + “When it’s time to downsize” should provide you with more time to prepare your home through staging for sale compared to when you feel pressure to sell.
- + If there are possessions in your home that are important to grown children, consider asking them to remove and store.
- + Consider reducing the space in which you currently live as a way of preparing for a smaller home.
- + If you’re considering moving to a residence with a homeowners association, be sure to read the association documents regarding fees and potential increases carefully.

## Let Berkshire Hathaway HomeServices Help

Ask a Berkshire Hathaway HomeServices network agent how they can help you maximize your present home’s value, market your property successfully and strategize with you regarding when and where to buy or rent next. If you are planning on moving out of your present area, we would consider it a privilege to serve you in your new destination.