



FREE GUIDE
Just for you!

Am I ready to *Downsize?*

FROM CONSIDERING YOUR OPTIONS, TO TAKING YOUR
FIRST STEPS TO DOWNSIZE, THIS GUIDE IS HERE TO HELP!



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ABOUT *Us*

Kelly & Robert Doucet


Life moves in seasons — and sometimes, the next one calls for a fresh start. Whether you're simplifying, moving closer to family, or trading space for freedom, we're here to help you make the transition with confidence and care. With seven kids between us, we know how much "home" means. We've guided families and retirees alike as they right-size, start new chapters, and turn memories into meaningful new beginnings. For us, it's not about transactions — it's about transition. We're here to make your next move smooth, supported, and full of possibility.

Grateful for every story. Inspired by every journey. Ready to help you start your next chapter.



Let's Connect

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MYEDHHOME.COM

An elderly couple with white hair are dancing in a modern home. The woman is wearing a light pink long-sleeved shirt, and the man is wearing a blue t-shirt. They are both smiling and looking at each other. A large, modern, white pendant lamp hangs above them. The background is a blurred interior space with light-colored walls and a dark doorway.

QUESTIONS & BENEFITS

Am I ready to
Downsize?

6 Questions To Ask

Deciding to downsize is a personal decision, and there's no one-size-fits-all answer. Instead of just looking at numbers and square footage...

Ask yourself these **6 key questions** to see if you're ready to downsize:

01. Do I feel overwhelmed by home maintenance?

If keeping up with cleaning, repairs, and yard work feels like a burden—or you're paying others to do it—it might be time to simplify. Imagine the relief of a home that fits your current needs, without the extra work.

02. Am I using all the space I have?

Think about how many rooms you actually use. Are there bedrooms sitting empty? A dining room that hasn't hosted a meal in years? If certain spaces feel more like storage than living areas, you might be holding onto square footage that no longer serves you.

03. Would I rather spend my money (and time) differently?

A bigger home often means higher costs—property taxes, utilities, upkeep. Downsizing can free up money for things that matter more, like traveling, hobbies, or simply enjoying retirement without financial worry.

04. Does my current home support the lifestyle I want?

Maybe you'd love to be closer to family, live in a walkable community, or move somewhere with less upkeep (like a condo or active adult community). If your home no longer fits your ideal lifestyle, it might be time for a change.

05. Is my home still comfortable for me physically?

If stairs are becoming a challenge, or you worry about navigating your home as you age, a single-level or more accessible home could provide peace of mind for the future.

06. Would letting go of "stuff" feel like a relief or a loss?

Downsizing means decluttering. Does the idea of letting go of furniture, extra storage, or years of collected items feel freeing? Or does it feel overwhelming? If you're ready to simplify, that's a strong sign you're ready for a smaller space.

6 Benefits of Downsizing

✓ Lower Utility Bills

Less square footage means lower utility bills. Nearly half of a home's energy usage goes toward heating and cooling. You can use the same amount of water and lighting, keep your home at a comfortable temperature, and still save money on your monthly power bill.

✓ Increased Cash Flow

Lower utility bills translate to more cash to spend on other things. You can redirect that money into a rainy day fund, pay down your mortgage, travel the world, or bankroll a new business venture.

✓ Fewer Maintenance Costs

Think of all the time and money you spend each year on home maintenance, from cleaning to repairs. Nearly every line item in this category costs less in a smaller house. If you move into an apartment or condo, some home maintenance costs disappear altogether.





✓ Reduced Clutter

Moving into a smaller home forces you to scale back on clutter, making it easier to stay organized. Use the transition to declutter and explore a minimalist lifestyle, keeping only the things that you truly need and love.

✓ Less Cleaning

Less stuff and a smaller space means less cleaning. Almost every household chore will be easier and less time-consuming in your new home. You will have fewer square feet to vacuum and mop, smaller surfaces to dust, and less to tidy. Downsizing will save you time and effort if you handle your own cleaning, or save money if you hire a cleaning service.

✓ Less Financial Stress

Although you will have less physical space in your new home, downsizing will give you more breathing room financially. The lower physical and financial toll can help reduce your stress levels—which can have several health benefits. You may see positive changes in your mood, weight, sleep, focus, and relationships. You might also experience fewer headaches and stomachaches, less muscle tension, and a stronger immune system.

A photograph of an elderly couple in a warm, indoor setting. The woman, with short white hair, is wearing a brown sweater and has her arms around the man's shoulders. The man, with white hair and a beard, is wearing a light-colored sweater and is smiling broadly. They are both looking towards the camera. The background is slightly blurred, showing a home interior with a dining table and chairs.

SECURING YOUR LEGACY

Estate Planning (while downsizing)

Securing Your *Legacy*

(while downsizing)

01. Why Estate Planning Matters When Downsizing

As you simplify your living space, it's a great time to organize your financial & legal affairs. Estate planning ensures that your assets are distributed according to your wishes

02. Essential Estate Planning Documents

- **WILL:** A will outlines how your assets will be distributed after you pass away. If you don't have one, the state will decide for you, which may not align with your wishes.
- **LIVING TRUST:** A trust helps avoid probate, allowing assets to be transferred to heirs more quickly and privately.
- **POWER OF ATTORNEY:** A durable power of attorney designates someone to manage your finances if you're unable to do so.
- **BENEFICIARY DESIGNATIONS:** Many accounts, such as life insurance and retirement funds, allow you to name beneficiaries. Ensure these are up to date

03. When reducing possessions, consider estate planning goals:

- **Identify Valuable Assets:** Take inventory of high-value items (real estate, jewelry, collectibles) and decide how to distributed.
- **Gift or Donate:** Consider giving sentimental items to loved ones now, rather than leaving them in your estate. Charitable donations can also provide tax benefits.
- **Simplify Financial Accounts:** Consolidate multiple bank or investment accounts
- **Review Digital Assets:** Update access to online accounts, social media, and important documents

04. Avoiding Common Estate Planning Mistakes

- **Not Updating Your Plan:** Review your estate plan every few years or after major life events (downsizing, retirement, family changes).
- **Overlooking Joint Ownership Options:** Adding a joint owner to an account or property may help avoid probate, but it needs to be done carefully to prevent unintended consequences.
- **Ignoring Tax Implications:** Consult an estate planner to understand how taxes might affect your heirs and explore strategies like gifting and trusts.

05. Working with Professionals

Estate planning can be complex, so consulting an attorney or financial advisor ensures that your plan is legally sound and aligned with your downsizing goals.

Estate Planning Checklist

- **Update** your will and trust
- **Designate** power of attorney and healthcare proxy
- **Ensure** beneficiary designations are correct
- **Consolidate** and simplify assets
- **Organize** important documents in one accessible place

A photograph of a middle-aged couple with dark skin, smiling and looking out a window. The man is on the left, wearing a light blue polo shirt, and the woman is on the right, wearing a light green sweater. They are both looking towards the right side of the frame. The background is a bright, slightly blurred view of trees and a sky. A semi-transparent white box is overlaid on the bottom half of the image, containing text.

HOW TO PLAN FOR A DOWNSIZE

Next Steps for *Downsizing*



Top Tips to *Prepare*

Planning for a downsize can take extra time and energy. However, the effort will pay off on moving day and in the following weeks as you settle into your new home. Here are some tips to *help you plan downsizing* to a smaller home:

01. Prepare Your Budget

If keeping up with cleaning, repairs, and yard work feels like a burden—or you're paying others to do it—it might be time to simplify. Imagine the relief of a home that fits your current needs, without the extra work.

02. Account for All Moving Costs

In addition to creating a monthly or annual budget, you should create a comprehensive moving budget that includes all of your one-time moving costs. To estimate these, you must first decide how you will move. Ask yourself these questions:

- Will you hire a full-service moving company or go the DIY route? **Research local moving companies to get quotes.**
- Will you handle all of the packing and unpacking or pay professional movers to help?
- Approximate packing supplies that might be used.

03. Declutter & Start Downsizing Early

- Focus on clearing out storage areas first (garage, attic, basement)
- If it hasn't been used in a year, consider letting it go
- Donate items to charity, sell valuable pieces online, host a garage sale

04. Depersonalize & Stage the Home

- Remove personal items like family photos and excessive decorations
- Simplify furniture arrangements to make rooms feel spacious
- Add neutral, inviting touches—light, airy curtains, fresh flowers, or throw pillows

05. Tackle Minor Repairs & Updates

- Patch up holes, fix leaky faucets, and replace burned-out light bulbs
- A fresh coat of neutral-colored paint can make rooms feel new & bright
- If appliances or fixtures are outdated, consider low-cost upgrades (new cabinet handles, updated light fixtures)

06. Boost Curb Appeal

- Keep the lawn mowed and landscaping tidy
- Add a fresh coat of paint to the front door
- Place a simple welcome mat or potted plants by the entrance





07. Deep Clean Everything

- Shampoo carpets, wipe down baseboards, and clean windows
- Eliminate pet odors or lingering smells with air purifiers or natural scents
- Pay special attention to kitchens and bathrooms—they should sparkle

07. Get a Pre-Listing Home Inspection (Optional)

Consider having an inspection before listing to catch and fix any major issues before buyers find them. This can help avoid last-minute surprises and make negotiations smoother.

08. Price It Right & Work With Us!

Our experience can help you:

- **Set the right price** based on recent sales in your area.
- **Market your home effectively** with professional photos and listings.
- **Negotiate offers** so you get the best value for your home.



Pre-List *To-Do List*

KITCHEN

LIVING ROOM

YARD

BATHROOMS

BEDROOMS

BASEMENT

Client Reviews

Rob and Kelly, Thank you again for your expertise, professionalism, compassion, friendship and just overall being so amazing to work with on selling the Concordia Drive house. You made the process so easy and efficient, and helped get us the best possible outcome. I can't imagine working with anyone else for our real estate needs.

-Heather

With so few homes for sale and so many buyers you might think anyone can sell a home. Maybe. But there is so much more to it at times and experience stands out. My Mother passed away suddenly and from Southern Ca I was left trying to emotionally support my father while getting his home sold quickly. Robert and Kelly not only had a confident game plan to get top dollar offers quickly, but the care, support and guidance they provided my father throughout the process was unexpected and left me beyond grateful to them. If you want experience, they have it. If you want to work with professionals that truly care, this is your team.

-Clayton

I am so glad we found Robert and Kelly to help us with the sale of our dad's house. It was a challenging and emotional move since we were not local and there were so many details to deal with, from getting rid of everything in the house to repairs to landscaping. They helped us with all of it. I am not sure how we would have managed without their support. They got us top dollar for the house and quickly and we could not be more grateful. What really mattered is that Robert and Kelly are good people. We really felt like they cared about making the process easy for us during a difficult time. That was the best part of our experience with the Doucets and we highly recommend them!

-Judy

Relocating to a new place and a new home after more than 25 years is difficult and emotional... Rob and Kelly alleviated the stress and provided so much helpful information in regards to the area's shopping, service providers, city and county info, etc.

Also, they continue to make themselves available for any assistance we need. It's a bonus to have enjoyed their company in time spent.

-Penelope



Let's stay in touch

We would be thrilled to help you with your transition to a new home that has all the elements to make everyday life easier. Your goals and needs are our top priority! We're always here to answer any questions you may have so reach out anytime!

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