

DOWNSIZING & RELOCATING STRATEGIES

Is It Time to Rethink Where—and How—you Live in Retirement?

	YES	NO
1 Are you currently living in a home that feels too large or requires too much upkeep?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you want to lower your monthly living expenses in retirement?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you thought about moving closer to family, friends, or healthcare services?	<input type="checkbox"/>	<input type="checkbox"/>
4 Would a one-level home, condo, or apartment better suit your needs as you age?	<input type="checkbox"/>	<input type="checkbox"/>
5 Do you worry about property taxes, insurance, or utility bills continuing to rise?	<input type="checkbox"/>	<input type="checkbox"/>
6 Are you interested in living in a warmer climate or retirement-friendly state?	<input type="checkbox"/>	<input type="checkbox"/>
7 Would selling your current home free up equity to use for other retirement goals?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you feel emotionally or physically overwhelmed by maintaining your current home?	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you explored how downsizing could affect your lifestyle, not just your finances?	<input type="checkbox"/>	<input type="checkbox"/>
10 Would a simpler or more convenient living arrangement improve your day-to-day life?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:

- 7–10 Yes Answers:** Downsizing or relocating could significantly enhance your retirement experience—personally, financially, and emotionally.
- 4–6 Yes Answers:** You might benefit from exploring downsizing or relocation options that better align with your retirement goals and lifestyle.
- 0–3 Yes Answers:** Downsizing or relocating may not be necessary at this time, but it's worth reviewing your housing needs regularly.