VRG REALTY PRESENTS

The Senior Transition Workbook

A Family Planning Guide for Downsizing and Senior Moves

Every worksheet and checklist your family needs, ready to print and fill in.

Provided free by VRG Realty LLC · Kennewick, Washington
Serving the Tri Cities: Kennewick, Richland, Pasco, and West Richland

WELCOME

How to Use This Workbook

This workbook walks your family through a senior move step by step. Each worksheet matches one stage of the journey, in the same order your family will experience it.

A few suggestions:

- Print the whole workbook and keep it in a binder.
- Print extra copies of the Community Tour sheet, one per community you visit.
- Bring the binder to every meeting, tour, and family conversation.
- Don’t try to finish it in one day. One worksheet at a time.

The worksheets in this book:

Questions along the way? VRG Realty is here to help.
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WORKSHEET 1

Our Destination

Complete this page before making any major decisions. Every future choice should move you toward the answers you write here.

What does a successful outcome look like for your loved one?

What does a successful outcome look like for your family?

What concerns you the most about this transition?

What are your loved one's greatest wishes?

Your loved one's greatest needs (check all that apply):

■ Safety ■ Close to family

■ Independence ■ Single level living

■ Medication management ■ Financial stability

■ Memory care ■ Other: ______________________ ■ Transportation

WORKSHEET 2

The Conversation

Resistance is normal. Behind every “I’m not going anywhere” is a specific worry nobody has asked about yet. Use this page to find it.

What do you believe your loved one’s biggest fears are about moving?

Which family member has the best relationship to start the conversation?

Family meeting date and time:

Questions to ask (not announcements to make):

- “What do you love most about living here?”
- “What parts of the house have become harder to manage?”
- “If your health ever changed, what would you want us to do?”
- “Would you ever want to look at a few places together?”

What did you learn? What is the real worry behind the resistance?

If conversations are stuck, one outside professional who could help:

WORKSHEET 3

Family Roadmap

Where you're going, when it needs to happen, and who is responsible for each part.

Timeline

Suggested milestones: housing selected, move date set, family meeting, estate sale, cleaning, home preparation, home listed, closing.

Family Responsibilities

WORKSHEET 3, CONTINUED

Documents and Floor Plan

Important documents (locate and secure)

■ Will ■ Health insurance cards

■ Trust ■ Military records

■ Durable Power of Attorney ■ Property deeds

■ Healthcare Power of Attorney ■ Vehicle titles

■ Living Will / Advance Directive ■ Bank information

■ Birth certificate ■ Investment accounts

■ Marriage certificate ■ Insurance policies

■ Social Security card ■ Recent tax returns

■ Medicare card ■ Funeral instructions

Items that won’t fit in the new home

WORKSHEET 4

Community Tour Sheet

Print one copy of this sheet for every community you visit, then compare them side by side. **Community name:**

Date visited / monthly cost quoted:

What I observed (check what you saw)

■ Residents appear happy and engaged ■ Residents appear well cared for ■ Staff greet residents by name ■ Emergency call systems visible ■ Common areas are clean ■ Dining areas clean ■ Hallways well lit ■ Activities taking place ■ No strong odors ■ Atmosphere feels welcoming ■ Outdoor areas maintained

Answers to key questions

What's included in the monthly cost? What costs extra?

How often do rates increase, and by how much recently?

What happens if more care becomes necessary?

Staff to resident ratio / staff available 24 hours?

Overall impressions:

WORKSHEET 5

Money Worksheet

This page organizes information for your meetings with a financial advisor, CPA, or elder law attorney. It is not financial advice.

Current monthly picture

Possible funding sources to investigate

■ Income and savings ■ VA Aid and Attendance (military service in family?) ■ Proceeds from selling the home ■ Medicaid (talk to elder law attorney first) ■ Long term care insurance (policy located?) ■ Other: ______________________

Appointments to schedule

■ One hour with a CPA before selling the home ■ Elder law attorney (if Medicaid may ever be needed)

■ Financial advisor review ■ County Veterans Service Officer (if applicable) **Questions to bring to the CPA or attorney:**

WORKSHEET 6

Professional Team

Interview two or three people for every role. Keep everyone's contact information on this page.

Before hiring anyone, confirm:

■ Licensed (if required) ■ Written estimate received ■ Insured ■ Pricing explained clearly

■ References provided ■ Comfortable asking them questions

WORKSHEET 7

Protection Checklist

Slow down, get second opinions, and secure what matters before professionals start coming through the home. **Secure these items in one locked or private location**

■ Jewelry ■ Military medals

■ Cash ■ Family photographs

■ Checkbooks ■ Firearms (stored safely and legally) ■ Credit cards ■ Coin collections

■ Prescription medications ■ Sports memorabilia

■ Passports ■ Legal documents

■ Birth certificates ■ Family heirlooms

■ Social Security cards

Secure location chosen / who has access:

Before any major repair or financial decision

■ At least two estimates obtained ■ References requested ■ Licensing verified ■

Everything in writing

■ Insurance verified ■ Slept on the decision

■ Online reviews read ■ Second opinion on anything over a few thousand dollars

Anything that doesn't feel right? Write it down and talk it through:

WORKSHEET 8

Sorting and Family Distribution

Every item lands in one of four categories: Keep, Family, Donate, Sell. When in doubt: Decide Later.

Room by room progress

Family Distribution Record

Track belongings promised to family members. A written record prevents hurt feelings later.

Before donating or discarding, check for value: coins, cards, jewelry, watches, antiques, artwork, military items, vintage toys, instruments, rare books, old tools. And check the hiding places: coat pockets, book pages, the freezer, under mattresses, picture frames.

WORKSHEET 9

Estate Sale Planner

Confirm every keepsake is out of the house before any sale begins. Then choose the path that fits your timeline. **Which path fits?**

■ Estate sale (full house, flexible timeline) ■ Consignment (a few nice pieces) ■ Auction (collections, antiques, tools) ■ Online selling (high value items, patient seller) ■ Buyout (tight timeline, less money, fast) ■ Donation and junk removal (modest contents)

Company comparison

Ask each company: percentage and fees · insurance · how they price unusual items · security and staffing · minimum prices allowed? · what happens to unsold items · when and how you're paid · references.

■ All keepsakes removed BEFORE sale ■ Junk removal scheduled

■ Agreement in writing ■ Cleaning scheduled after ■ Donation receipts requested

WORKSHEET 10

Preparing the Home

The goal isn't perfection, it's preparation. Don't spend on big projects without talking to your Realtor first.

Repairs and touch ups needed

Home information to gather

■ Roof age: _________ ■ HOA info

■ HVAC age: _________ ■ Septic / well records

■ Water heater age: _________ ■ Warranties

■ Appliance ages ■ Repair receipts

■ Utility providers ■ Permits for improvements

Before photography

■ Deep clean complete ■ Beds made

■ Curb appeal done (mow, trim, sweep) ■ Vehicles moved

■ Blinds open ■ Pet items away

■ Counters cleared ■ Valuables secured

Selling the Home

Interview two or three Realtors. The best one helps you make informed decisions, not just the one who quotes the highest price.

Realtor comparison

Ask: years of experience · homes sold last year · downsizing and estate experience · marketing plan · how they price · communication schedule · point of contact · process from listing to closing.

- Realtor and title company told about any POA / trustee / estate authority
- Showing plan works for your loved one
- Disclosures answered honestly
- Rent back discussed if new home isn't ready
- All paperwork kept in one folder

WORKSHEET 12

Moving Day

The goal isn't unpacking every box. It's ending the day with your loved one feeling safe and comfortable.

Overnight bag (keep with a family member)

■ Medications ■ Comfortable clothes ■ Glasses ■ Pajamas

■ Hearing aids and batteries ■ Toiletries

■ Phone and charger ■ Snacks and water ■ Wallet / purse ■ Important documents ■ Keys ■ Emergency phone numbers

Never on the truck

■ Jewelry ■ Passports

■ Cash ■ Legal documents ■ Checkbooks ■ Photo albums

■ Credit cards ■ Computer backups ■ Medications ■ Firearms

■ Birth certificates ■ Collections

WORKSHEET 12, CONTINUED

Walkthrough, First Day, and Address Changes

Final walkthrough of the old home

■ Kitchen cabinets ■ Crawl space

■ Pantry ■ Shed

■ Bathroom cabinets ■ Refrigerator / freezer ■ All closets ■ Washer / dryer

■ Garage ■ Mailbox

■ Attic ■ Yard and gates

First day priorities in the new home

■ Bed assembled ■ TV / phone working ■ Medications accessible ■ Photos displayed

■ Bathroom stocked ■ Kitchen basics unpacked ■ Favorite chair placed ■ Documents secured

Address change checklist

■ United States Postal Service ■ Physicians

■ Social Security ■ Pharmacy

■ Medicare ■ Utility companies

■ Banks ■ Family and friends ■ Credit card companies ■ Subscriptions

■ Insurance companies ■ DMV or Department of Licensing ■ Investment accounts ■ Voter registration

Other accounts to update:

WORKSHEET 13

After a Loss

Handle what’s urgent. Let everything else wait until authority is clear and your family is ready.

Urgent (first two weeks)

■ Home secured: locks, alarm, keys accounted for ■ Mail stopped or forwarded ■ Valuables and documents secured ■ Pets and perishables handled

■ Insurance company called (vacant home coverage)

■ Will or trust located

■ Utilities kept on

Not urgent (wait until authority is clear)

■ Emptying the house ■ Listing or selling the home ■ Distributing belongings ■ Signing anything with buyers or investors

Estate attorney consultation date:

Who has legal authority (executor / personal representative / trustee):

Questions for the attorney

■ Does this estate need probate? How long?

■ Who can manage and sell the home?

■ Can we start sorting belongings?

■ Who pays the bills meanwhile, and how are they reimbursed?

■ Any deadlines?

■ What records should we keep?

Ask the CPA about the step up in basis before selling. Notes:

WORKSHEET 14

The Whole Journey, One Page at a Time

Every action plan condensed by phase. Check items off as your family completes them.

Phase 1: Getting Aligned

■ Define what success looks like ■ Family meeting held

■ All decision makers agree on the goal ■ Outside help if stuck

■ Start the conversation with questions

Phase 2: Planning

■ Destination decided ■ Documents gathered and secured ■ Two or three communities toured ■ Floor plan and list of items that won't fit done ■ Written timeline created ■ Responsibilities assigned

Phase 3: Money and Team

■ Income and expenses added up ■ CPA meeting before selling ■ LTC policy located / insurer called ■ Elder law attorney (if Medicaid possible) ■ Veterans Service Officer contacted (if applicable) ■ Professionals interviewed, two or three per role

WORKSHEET 14, CONTINUED

Master Timeline

Phase 4: Protecting and Sorting

■ Secure room created ■ Stories recorded

■ Second opinions on major repairs ■ Family Distribution Worksheet complete ■ Home sorted room by room

Phase 5: Emptying and Preparing

■ Selling path chosen ■ Junk removal and cleaning done ■ Two companies interviewed ■ Repairs and curb appeal complete ■ Keepsakes out before any sale ■ Home info gathered ■ Donation receipts collected ■ Photo ready

Phase 6: Selling and Moving

■ Two or three Realtors interviewed ■ Overnight bag packed; valuables off the truck ■ POA / trust / estate authority disclosed early ■ Final walkthrough done ■ Offers evaluated as complete packages ■ Bedroom and bathroom set up first ■ Addresses updated

This wasn’t just a move. It was an act of love.

Provided free by VRG Realty LLC · Value, Respect, and Guidance
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