

Relocation Checklist

Includes items that address planning considerations for age-qualified and senior-focused communities, including lifestyle and amenities..

Community & Lifestyle Fit

- _____ Age-restricted (55+) or age-targeted?
- _____ Social environment & activity level appropriate?
- _____ Walkability & neighborhood condition acceptable?
- _____ Pet policies appropriate?
- _____ Visited community at different times of day?

Comments:

Home Features & Layout

- _____ Single-level living (no steps to main areas)
- _____ Zero-step entry
- _____ Wide doorways and hallways
- _____ Accessible bathroom layout
- _____ Walk-in shower available?
- _____ Exterior modifications allowed by HOA?
- _____ Lot size appropriate and manageable

Comments:

Location & Convenience

- _____ Close to grocery stores
- _____ Proximity to hospitals and urgent care
- _____ Pharmacy nearby
- _____ Nearby parks, walking trails, or fitness centers
- _____ Drive time to friends and family acceptable
- _____ Nearby senior centers

Comments:

Amenities & Activities

- _____ Clubhouse or activity center
- _____ Fitness center, pool, walking paths
- _____ Clubs and hobby groups available
- _____ Regular community events
- _____ Volunteer opportunities available

Comments:

HOA & Covenants Review

- _____ HOA fee amount and billing schedule understood
- _____ What services the fees include
- _____ Fencing rules acceptable
- _____ Exterior structure rules clear (sheds, etc.)
- _____ Parking/vehicle restrictions acceptable
- _____ Rental or Airbnb rules understood
- _____ Architectural review process clear

Comments:

Financial Planning

- _____ Property taxes and available exemptions reviewed
- _____ Utility cost estimates acceptable
- _____ Insurance requirements understood
- _____ Long-term affordability confirmed
- _____ Closing costs @ moving expenses estimated

Comments:

Medical & Support Resources

- _____ Nearby primary care providers
- _____ Access to specialists needed
- _____ Home health agencies nearby
- _____ Nearby pharmacies and labs

_____ Senior resource agencies accessible

Comments:

Downsizing & Moving Preparation

- _____ Home inventory completed
- _____ Junk removal or downsizing services contacted
- _____ Movers hired
- _____ Pet transportation arranged
- _____ Mail forwarding prepared

Comments:

Pre-Move Logistics

- _____ Closing finalized
- _____ Utilities transferred
- _____ Voter registration updated
- _____ Moving day checklist prepared

Comments:

Move-In & Community Orientation

- _____ Introduced to neighbors
- _____ Reviewed activity calendar
- _____ Attended first community event
- _____ Amenities and warranties

confirmed

Comments:

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