



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

Community & Lifestyle Fit

_____ Visited community at different times of day?

_____ 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:

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:

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:

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:



Before You Move

- ☐ Confirm closing date & time
- ☐ Lender's contact: _____
- ☐ Closing attorney's contact:

- ☐ Complete final walk-through
- ☐ Submit change-of-address
- ☐ Schedule utilities for transfer
- ☐ Gather important documents
- ☐ Medications and prescriptions transferred if needed

Preparing Your Home

- ☐ Complete home inventory
- ☐ Arrange donations
- ☐ Estate sale or consignment completed (if needed)
- ☐ Schedule junk removal
- ☐ Purchase packing supplies
- ☐ Prepare "essentials box" for moving day
 - ☐ Medications
 - ☐ Phone charger(s)
 - ☐ Toiletries
 - ☐ Pack an overnight bag (1–2 days)
 - ☐ Important documents
 - ☐ Basic tools (screwdriver, utility knife, flashlight)
 - ☐ Coffee maker or kettle (if important to you!)
 - ☐ Paper towels & toilet paper
 - ☐ Snacks and bottled water

If You Have Pets

- ☐ Food and water
- ☐ Medications
- ☐ Leash, carrier, or crate
- ☐ Favorite toy or blanket

NOTES:

One Week Before the Move

- ☐ Confirm movers
- ☐ Confirm utility transfers
- ☐ Pack an overnight bag
- ☐ Refill prescriptions
- ☐ Defrost refrigerator (if needed)
- ☐ Confirm closing time and location

Moving Day

- ☐ Take final utility meter photos (if applicable)
- ☐ Take photos of the home before leaving
- ☐ Keys, garage remotes, and access codes available
- ☐ Utilities functioning at new home
- ☐ Important documents kept with you
- ☐ Medications packed separately
- ☐ Valuables transported personally

After the Move

- ☐ Driver's license/address updated
- ☐ Voter registration updated
- ☐ Banks and insurance notified
- ☐ Physicians and pharmacies updated
- ☐ Friends and family notified
- ☐ Mail forwarding verified

Settling In

- ☐ Check smoke and CO detectors
- ☐ Post emergency contacts
- ☐ Introduce yourself to neighbors
- ☐ Review the community activity calendar
- ☐ Attended first community event
- ☐ Locate nearby grocery and pharmacy
- ☐ Review community amenities and activities
- ☐ Update emergency information
- ☐ Locate the nearest emergency room/urgent care

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