

DOWNSIZING QUESTIONNAIRE

Your answers to these questions will help make the right choice for downsizing to an apartment, a condo, a smaller home or a Senior community. Be sure to include answers from your partner for discussion purposes.

Fill-in or check your answers:

1. CA area(s) to consider? _____, or a move out-of-state to _____
2. Do you prefer? High-rise _____ (or) Low-rise (4-5 stories) _____ Single-story _____ Senior community _____
3. What is your required room count? Bedrooms _____ Bathrooms _____ Office _____ Formal Dining _____ Den _____ Maid's _____ Other _____
4. What services are important? Doorman _____ Valet parking _____ Concierge _____ Meal preparation _____ Assisted-living services _____ Security gate _____ Other _____
5. What amenities do you want? Pool _____ Gym _____ Balcony _____ Storage _____ Walk-in closet _____ Other _____
6. Are you sensitive to traffic noise? No _____ Yes _____
7. Do you prefer? Remodeled _____ Light fixer _____ Total fixer _____
8. Pet(s) living with you? Dog(s) _____/weight _____ Cat(s) _____/weight _____
9. Do you need to sell your current home before buying? Yes _____ No _____ N/A _____
10. What is a desired monthly rental or purchase price? Up to \$ _____
12. Acceptable monthly cost for homeowner association dues? Up to \$ _____
13. Is your current property tax under Proposition 13? Yes _____ No _____
14. What is your timeframe for moving? _____

From the above answers, list your **top five must-haves:** 1. _____

2. _____ 3. _____

4. _____ 5. _____

Return this completed questionnaire to me and I will call you for a discussion. My expertise and knowledge is the key to finding your next dream home.

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