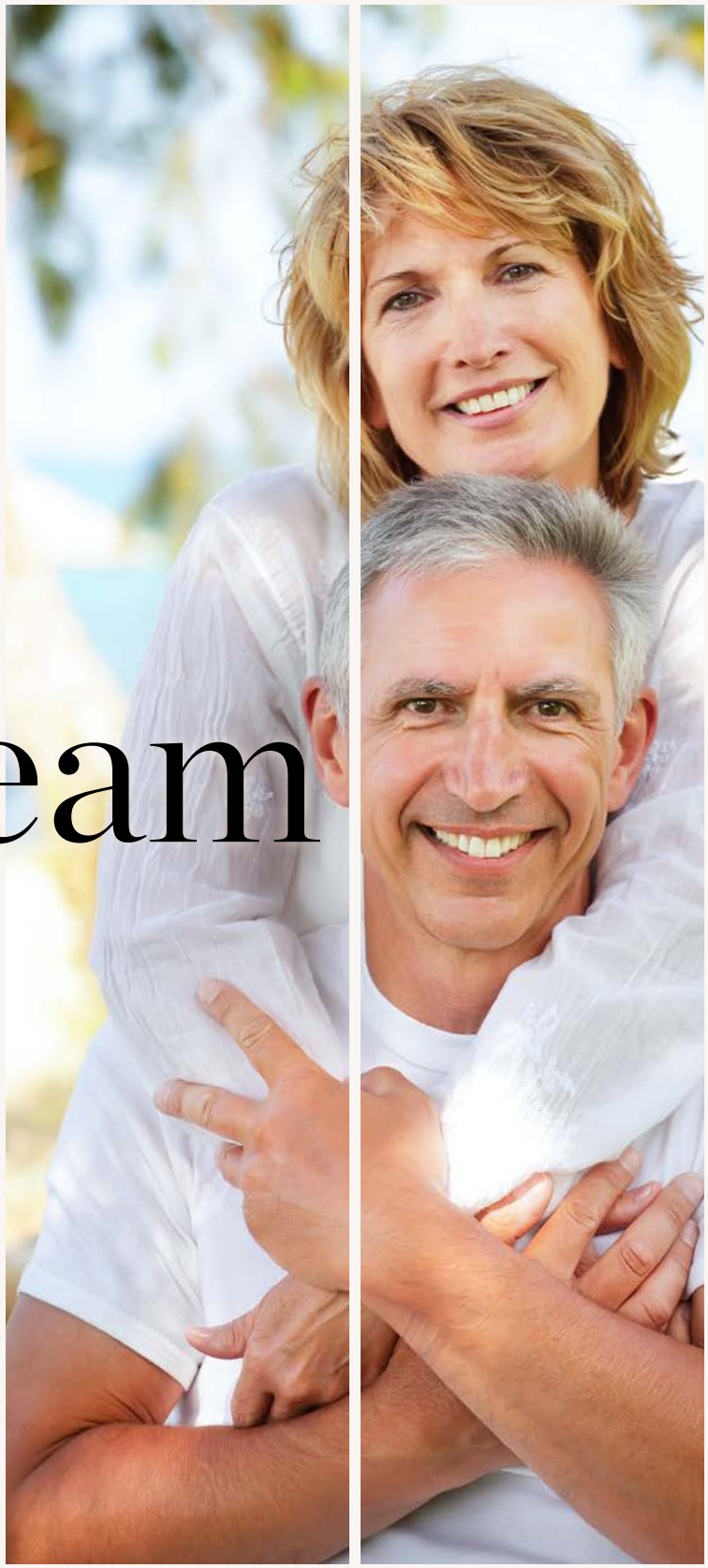
From *Chaos* to Calm™

THE 5-STEP APPROACH
TO RIGHT-SIZING

Livin' the Dream



OUR SIGNATURE METHOD HELPS DOWNSIZERS OF ALL KINDS TAKE ADVANTAGE OF THEIR LARGEST ASSET TO LIVE THEIR DREAM.

REAL Broker Ontario Ltd.
Brokerage

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Downsizers. Empty Nesters. Savvy Seniors.

It used to be "downsizing" your home only occurred when you retired. But today's downsizers are at all different stages of life.

Yet they ALL have one thing in common - their current property isn't meeting their lifestyle requirements.

So, whether you're a Retiree looking to travel the world or the kids have finally left the nest and there's just too much room, "rightsizing" your housing follows the same path.

Our Signature **"From Chaos to Calm" Method** addresses the specific needs and requirements of every downsizer.

"Livin' the Dream" is a 5-step process that can help you maneuver this entire endeavour Most people are familiar with up sizing their home - more space to fill is a far different mindset than reducing space.

The rewards are different.... and so are the pitfalls. We've designed this process with YOU in mind.



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This group differs significantly to any other group of consumers.

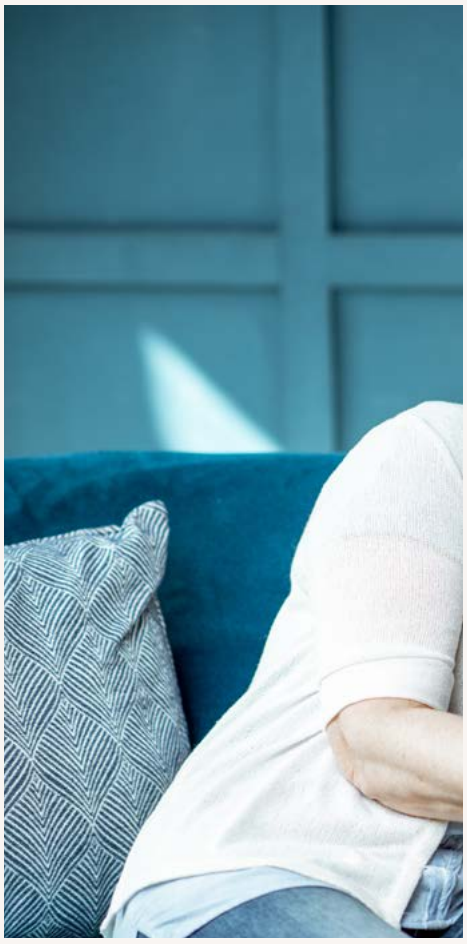
Their HOME is more than an investment - it's the place they started families, created a life - there's alot of sentimentality attached.

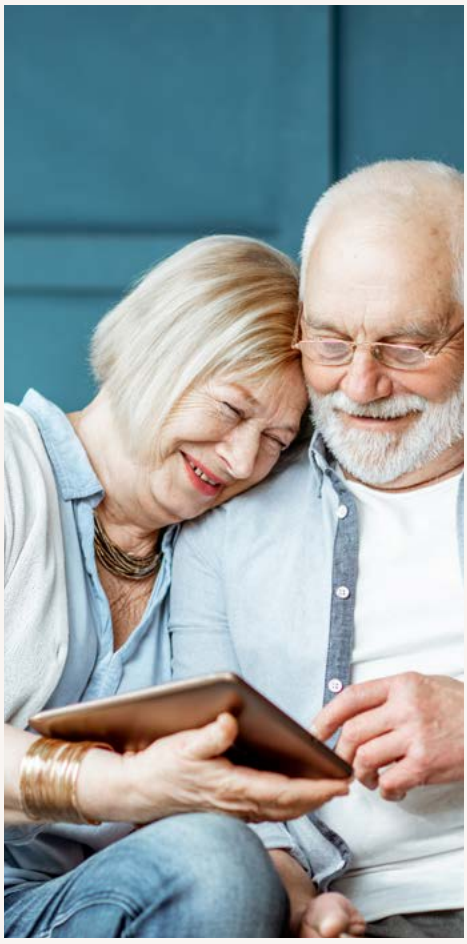
Considering the sale of the family home can be overwhelming and requires support, patience and guidance (IF that's the solution for you!)

Things are very different in the real estate space than when they purchased their current home. In today's financial arena, there are many more flexible ways to unlock your home's value.

This group of "downsizers" are a unique demographic all on it's own, and their idea of the "next adventure" varies significantly.

No two plans are ever alike. That's where we can help.







STEP ONE:

START AT THE END TO GET TO THE BEGINNING



It's all about "YOU"

Before you can decide HOW to accomplish your goal, you must first decide WHAT you want your next adventure to look like.

So we start at the end and work backwards.

- Is it travel you're planning?
- Need more cash liquidity?
- Divorce has changed your life plan?
- House too big and you'd like a smaller space that's more manageable?
- Want to help the kids/grandkids financially?
- Do we renovate the current home to match our new lifestyle & stay?
- Do we tap into our equity and use it to finance our dream?

No matter what your next adventure looks like, we can help you determine the "how" AND whether your goal is realistic and achievable.

If you are contemplating a life change & wonder where to begin .... you've come to the right place. Our method is designed to make your transition seamless AND avoid the pitfalls.

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STEP TWO:

GATHER YOUR TEAM OF EXPERTS

The Realtor, the Lawyer, the Financial Planner & Family

This is where we take a cold hard look at where we are so we can get to where we want to be.

The Realtor

We establish value of your current property, what it takes to get it on the market and net the highest sale price possible is. Then we figure out what your purchase price range is for the next home.

The Lawyer

Lawyers can help you establish an estate plan (wills, living will, etc.) and/or help minimize future legal/tax exposure.

The Financial Advisor

This is where you ensure that this move is in alignment with your long-term goals. Tax implications, "gifting" family members, etc. We need to ensure we've considered any potential financial pitfalls that might trip us up.

Family

If there's children or extended family involved, this is the time for the stake holders to offer their insights.

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STEP THREE:

PLAN THE PLAN

This is where the fun begins! Putting together the list of wants/needs of your perfect property, the neighbourhoods/communities that fit your new lifestyle, and mapping out the route to get you there.

We not only look forward towards the next property, but we tackle the art of decluttering and purging the contents of your current home. Because we know can't take it all to a smaller space. THIS exercise is sometimes an unexpected emotional roller coaster. What to take, what to donate, what to sell and what to give away .... it's sometimes harder than you think. And we are here to support you the entire way.

We also have the hard conversations of the reality of downsizing - are you ready to go from 2500sf to 800sf? Are you open to a condo lifestyle or is a smaller freehold the way to go? Whatever your choice is we make sure that you fully understand the consequences, good & bad.

But once we have a broad idea of area, property type and price range, we hook you up to our Buyer VIP email program. On a daily basis, you will receive an email of the entire list of properties that are new or have had a price change that MATCH the criteria you have established.

As we begin to get a flavour for what's out there in the market, we begin to make the decision of whether to buy first or sell first.

But before we can do that, we need to ensure that the market offers us what we are looking for in the price range we are comfortable with. And that leads us to the "market orientation phase" covered in Step 4.





STEP FOUR:

THE BUY FIRST/ SELL FIRST DECISION

The biggest question we get is...Do we buy first or sell first?

Well, that depends on our goals, our financial picture and our target area that we wish to move to. This is where we begin our market orientation phase.

THIS IS A STEP OFTEN OVERLOOKED, YET IT IS THE MOST IMPORTANT STEP OF THIS PROCESS.

We get out there to see what our potential dollar buys us and whether it matches our sense of reality. We also establish if this is a market that is a Seller's market or a Buyer's market. Do homes sell fast? Or do they take a while to sell?

Isn't it better to find out BEFORE you've sold your home that the area you desire to live in isn't affordable for you? But it's also a time to sample areas you may not have considered. We can help guide you to the community that is perfect for YOU.

This is one of the most important steps. This ensures we can buy what we need/want for the dollar we have/ will have. The beauty here is we haven't sold anything yet. It avoids the worst case of, "we've sold our house but we can't afford what we want in the community we want it in". That would be a disaster.

So, at the end of this step, we either feel good about the market and go ahead with the plan or say... "we aren't moving", or "we will reno and stay" or "cash out equity and stay".

But whatever your decision, it's an informed one.

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STEP FIVE:

READY TO LAUNCH

So we're satisfied that our next move is viable and that market offers what we are looking for. Now we put the "Roadmap" in place.

We also define our target market for your property. Are we searching for first-time buyers? Professional up-sizers? Young families?

We must be clear on our "perfect buyer". Then we can connect with them using platforms they frequent and speak in the vernacular they use. It's pointless to place ads in a magazine when our perfect buyers are hanging out on Instagram.

Then we HIT the market!

OR, if we have decided to buy first, we get shopping WHILE we prep the house.

This step also ensures we all stay on the same page. With a flurry of activity, it can be easy to get overwhelmed. Our "Roadmap" helps keep everyone focused. Sellers are never in doubt of what's happening and when and by whom. The goal is always "No surprises".



And before you know it.... You're SOLD!! You've PURCHASED!!

Your closing dates have been coordinated, we've collected any waiver/amendments necessary, we've signed off on each contract and the deals are FIRM.

Whatever needs to take place between sale and closing, we ensure you are completely aware of how and what is happening. THEN we can drink a toast to a great sale!

Documents, Documents, Documents.

It can be a landslide of paper! But rest assured, all the documentation and associated activities are handled by us. We ensure you also have all the pertinent documents in your possession. That's where our "Seller's Binder & "Buyer's VIP Binder" come in. It's a simple but brilliant way to keep track of ALL the documents including the deal itself.

One place. Easy Peasy.

This step makes sure that after an accepted offer, the wheels don't fall off.

From Chaos to Calm







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THE 5-STEP RIGHT-SIZING METHOD

Ready to take on YOUR next adventure?

WHY NOT BOOK A DISCOVERY CALL WITH US TO SEE HOW WE CAN HELP MAKE YOUR NEXT MOVE, YOUR BEST MOVE!

CLICK BELOW TO BOOK YOUR 15 MIN DISCOVERY CALL WITH US

CLICK HERE TO BOOK A CALL



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