Pre Listing Downsizing Plan

A practical workbook for Southern New Hampshire homeowners who want to understand the move before the sign goes up.

Start with the move, not the listing.

Use this plan to connect your next home, likely proceeds, transaction timing, property preparation, documents, showings, moving logistics, and a backup plan.

How to use this plan

You do not need to finish every page in one sitting. Begin with the questions that affect your next move most. Bring the completed pages to an early planning conversation with your real estate, lending, legal, tax, insurance, and moving professionals as appropriate.

- ☐ Circle or check the decisions that already feel clear.
- ☐ Mark the questions that need a professional answer.
- ☐ Keep estimates separate from confirmed numbers and dates.
- ☐ Update the plan when the next home or transaction sequence changes.

Your starting point

Name	
Property address	
Ideal moving window	
The biggest question on my mind	

Prepared by Linda Jennings, REALTOR®
Berkshire Hathaway HomeServices Verani Realty
Licensed in New Hampshire and Massachusetts | SRS | RENE
603-340-3907 | linda.jennings@verani.com

1 Define the next home before preparing this one

A smaller home is not automatically a better fit. Describe the routines and responsibilities you want the next home to support. These priorities will help guide timing, budgeting, and what you should keep.

My three must haves

My three preferences

Daily life to test

- ☐ Parking to kitchen, including rain, snow, and groceries
- ☐ Bedroom to full bath and laundry
- ☐ Steps, door widths, storage, lighting, and outdoor access
- ☐ Pets, visitors, hobbies, furniture, and workspace
- ☐ Maintenance responsibilities, association rules, and services

Locations or housing types to explore

2 Build the money and timing map

Use real property specific numbers whenever possible. The goal is a planning range, not a promise. Ask the appropriate professionals to explain financing, taxes, insurance, legal documents, and transaction costs for your situation.

Current home	Planning amount	Confirmed by
Estimated sale range		
Mortgage and other liens		
Likely selling expenses		
Repair or preparation budget		
Moving, storage, and temporary housing		
Estimated usable proceeds		

Choose the sequence to investigate

- ☐ Sell first, then buy. What temporary housing or storage would be needed?
- ☐ Buy first, then sell. Can I qualify and carry both homes if the sale takes longer?
- ☐ Coordinate both transactions. Which dates and funds depend on the other closing?
- ☐ Rent before buying. What lease, pet, storage, and second move costs should I include?

Questions for the lender or financial professional

3 Prepare the property with a purpose

A useful pre listing plan separates essential work from optional work. Avoid starting expensive projects until you understand the home, likely buyer expectations, your timeline, and the return the work is meant to support.

Task or concern	Must do	Helpful	Skip for now	Who will confirm

Documents to gather

- ☐ Mortgage, lien, deed, trust, estate, or ownership records that may affect the sale
- ☐ Property tax, insurance, utility, association, and maintenance information
- ☐ Permits, plans, warranties, service records, and improvement receipts
- ☐ Well, septic, radon, environmental, or other property specific records, if applicable
- ☐ Condominium or association documents, contacts, fees, and move requirements, if applicable

People or services I may need

4 Plan showings, moving, and Plan B

The best plan respects everyday life while the property is on the market and leaves room for closing or possession dates to move. Write down the routines that need protection and the fallback before a deadline becomes urgent.

Showing plan

- ☐ Preferred notice and showing windows
- ☐ Plan for pets, medications, documents, valuables, and mobility needs
- ☐ Daily reset that can be completed without a major cleaning session
- ☐ A person to contact if I need help before or after a showing

Moving logistics

- ☐ Mover, packing help, donation pickups, storage, and disposal options
- ☐ Parking, elevator, association, or building requirements at both homes
- ☐ A first night bag and important records that stay with me
- ☐ Utilities, keys, possession, and property handoff responsibilities

My backup plan if dates change

Where I could stay	
Where belongings could go	
Who needs an immediate update	
Costs or reservations to understand	

Important contacts

Real estate professional	
Lender or financial professional	
Attorney or closing professional	
Mover or storage provider	

5 Bring these questions to the first meeting

A strong early conversation should reduce the list, clarify the dependencies, and identify which information still needs verification. You do not need a moving date or a perfectly prepared home to begin.

- ☐ How would you connect the sale of this home with the next home and moving timeline?
- ☐ What information do you need to estimate a realistic sale range and usable proceeds?
- ☐ Which preparation could matter for this property, and what would you avoid doing?
- ☐ What documents should I gather before listing or before considering a condo or 55+ community?
- ☐ How would you coordinate with my lender, attorney, movers, family, and other professionals?
- ☐ What could go wrong with my preferred sequence, and what backup plan would you suggest?
- ☐ How will we communicate, make decisions, and adjust the plan if dates change?

Notes and next steps

Ready for a calm planning conversation?

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