

FINDING YOUR RIGHT-SIZED HOME

A Framework for Evaluating Your Next Property

Downsizing doesn't mean settling. It means being intentional. Your next home should fit your life as it is now and as it will be in the coming years. The goal is to find a home that works harder for you with less wasted space.

Before you start touring properties, get clear on what you actually need versus what you're used to having.

NEEDS VS. WANTS

Needs are non-negotiable. Without these features, the home won't work for your life.

Wants are preferences. They'd be nice to have, but you can live without them or find workarounds.

Be ruthless about this distinction. The longer your "needs" list, the harder your search becomes and the more you'll pay. Most people discover their true needs list is shorter than they expected.



THE ESSENTIAL QUESTIONS

Before evaluating any property, answer these questions:

How many people will live in this home full-time?

This determines your baseline bedroom and bathroom count. Two people don't need four bedrooms. Be honest.

How often do you have overnight guests, and how many?

If your grandchildren visit twice a year, you might not need a dedicated guest room. A sleeper sofa or convertible space might serve you better. If you host family regularly, a guest room matters more.

Do you work from home or need dedicated office space?

A desk in the corner of a bedroom works for occasional use. Daily remote work requires a more intentional setup.

What are your current or anticipated mobility considerations?

Think five to ten years ahead. Stairs that feel fine today may not feel fine at 80. Plan for the future, not just the present.

What activities do you do at home that require dedicated space?

Hobbies, exercise, crafting, woodworking. If you need space for something specific, name it and account for it.

How much outdoor space do you actually use?

A large yard you never sit in is just maintenance. A small patio you use daily adds value to your life.

HOME EVALUATION CHECKLIST

Use this checklist when touring and considering properties. Rate each category and take notes.
When you've seen several homes, compare your ratings to see which property best fits your needs.

ACCESSIBILITY & AGING IN PLACE

- ☐ Single-story layout or primary bedroom on main floor
- ☐ Step-free entry (no stairs to front door)
- ☐ Doorways wide enough for wheelchair or walker (32 inches minimum)
- ☐ Bathroom on main floor
- ☐ Walk-in shower or ability to convert tub to walk-in
- ☐ Grab bar potential in bathrooms (blocking in walls)
- ☐ Lever-style door handles (easier than knobs)
- ☐ Good lighting throughout, especially stairs and entries
- ☐ Low-maintenance flooring (no high-pile carpet to trip on)
- ☐ Garage attached to home with interior entry

Notes:

MAINTENANCE & UPKEEP

- ☐ Yard size is manageable (or HOA handles landscaping)
- ☐ Exterior materials are low-maintenance (brick, vinyl, etc.)
- ☐ Roof age and condition
- ☐ HVAC age and condition
- ☐ Windows are efficient and in good repair
- ☐ No major repairs or updates needed immediately
- ☐ HOA handles exterior maintenance (if applicable)

Notes:

SPACE & LAYOUT

- ☐ Total square footage feels right (not too big, not cramped)
- ☐ Room sizes accommodate your essential furniture
- ☐ Open floor plan or defined rooms (whichever you prefer)
- ☐ Adequate closet and storage space for your reduced belongings
- ☐ Kitchen layout is functional for how you cook
- ☐ Laundry location is convenient (main floor preferred)
- ☐ Room for guests if that's a priority
- ☐ Flexible space that can adapt as needs change

Notes:

LOCATION & LIFESTYLE

- ☐ Proximity to family and friends
- ☐ Distance to healthcare facilities and doctors
- ☐ Access to grocery stores and daily necessities
- ☐ Proximity to activities you enjoy (church, clubs, recreation)
- ☐ Walkability of neighborhood
- ☐ Safety and security of area
- ☐ Access to public transportation (if needed)
- ☐ Airport proximity (if you travel frequently)

Notes:

FINANCIAL FIT

- ☐ Purchase price within budget
- ☐ Property taxes are reasonable
- ☐ HOA fees are acceptable and stable
- ☐ Utility costs are manageable
- ☐ Insurance costs are reasonable
- ☐ No expensive updates required immediately

Notes:

COMMUNITY & LIFESTYLE

(FOR CONDOS, 55+ COMMUNITIES, OR PLANNED DEVELOPMENTS)

- ☐ HOA rules align with your lifestyle
- ☐ Pet policies work for your situation
- ☐ Guest policies are acceptable
- ☐ Rental restrictions (if you might rent it out later)
- ☐ Financial health of the HOA
- ☐ Amenities you'll actually use
- ☐ Community vibe and neighbors
- ☐ Noise levels and privacy

Notes:

My job is to help you balance emotion with practicality.

the five-year test

For every home you seriously consider, ask yourself: Will this home still work for me in five years? What about ten?

You're not just buying for today. You're buying for the next chapter of your life. A home that works perfectly now but will require another move in three years isn't the right home.

Consider:

- If your mobility declined, could you still live here safely?
- If your spouse passed away, would you want to stay here alone?
- If your health changed, is this home close to the care you might need?
- If your income decreased, could you still afford this home comfortably?

These aren't pleasant questions. But answering them now prevents painful decisions later.

red flags to watch for

Some issues are fixable. Others are signs to walk away.

PROCEED WITH CAUTION:

- Deferred maintenance (suggests hidden problems)
- High HOA fees with few amenities
- HOA with low reserves or history of special assessments
- Neighborhood in decline
- Long distance from healthcare or family

FIXABLE IF THE PRICE IS RIGHT:

- Cosmetic updates (paint, flooring, fixtures)
- Dated kitchen or bathrooms
- Landscaping improvements
- Minor accessibility modifications

A note on emotional decisions

You'll walk into a home and feel something. That feeling matters, but it shouldn't override logic. The home that photographs beautifully might have stairs you'll regret in three years. The home that feels underwhelming at first might be the one that actually fits your life.

My job is to help you balance emotion with practicality. That's what I'm here for.

COMMUNITY INFORMATION WORTH CONSIDERING

Listed are just a few of the local 55+ community facilities for you to consider and their service levels. There are also wonderful condo developments, or other areas that are particularly well-suited for 'right'sizing, whatever your preference or situation.



THE SPRINGS AT CARMAN OAKS

Lake Oswego, OR

Supports your lifestyle as you age. Offer independent living, assisted living, and memory care services. Amenities include multiple dining options, a pub, a salon, outdoor spaces, a putting green, a fitness center, and more.



MERRILL GARDENS

PORTLAND, OR

Three Portland metro locations! An active living community offering a variety of unique Independent Living, Assisted Living, and Memory Care lifestyle options. A private, family-owned company.



SUMMERFIELD ESTATES

Tigard, OR

Caters to residents who need minimal help or no help at all with their activities of daily living. Rent private apartments. Shared spaces and amenities like our dining room. Summerfield community: Single Family Homes | Condos | Townhouses | Apartments



KING CITY SENIOR VILLAGE

King City, OR

King City Senior Village offers offers 3 chef-prepared meals daily, scheduled transportation, a movie theater, library, salon, fitness center, and gathering spaces that encourage connection without sacrificing independence. Community also offers Single Family Homes | Condos

ADDITIONAL RESOURCES:

SEARCH FOR SINGLE LEVEL HOMES & CONDOS IN BEAVERTON:

<https://tinyurl.com/Single-Level-Beaverton>

VICKIE'S CONTACT INFORMATION: <https://tinyurl.com/VickiesInformation>

WASHINGTON COUNTY CARE FACILITIES & SENIOR HOUSING:

<https://www.washingtoncountyor.gov/davs/care-facilities-and-senior-housing>

