The Senior Home Transition Checklist



Sean Froelich
Seniors Real Estate Specialist (SRES), First Team Real Estate

1 Start the conversation

Talk about wishes, timeline, and who should be involved. Write down what matters most: staying near family, keeping familiar routines, being close to doctors.

2 Get the paperwork organized

Locate the deed, mortgage papers, power of attorney, trust or will, insurance policies, and medical directives. Keep them in one safe place and tell someone you trust where they are.

3 Know the numbers

Get a realistic idea of the home's value, the remaining mortgage balance, monthly carrying costs, and what care actually costs. Families tell us this is the moment everything becomes clearer.

4 Explore care options

Compare in-home care, assisted living, and memory care. Visit places, ask about waitlists, and talk to current residents' families. You don't need a decision yet, just information.

5 Understand your options for the home

The four main paths: keep the home, rent it out, downsize to something smaller, or sell. Each fits different situations, and borrowing against the home is also possible, with real risks to understand first.

6 Plan the practical details

Think through belongings, mail, utilities, pets, and who handles day-to-day logistics. Small decisions made early save big stress later.

7 Bring in the right people

A senior placement advisor or care manager, an elder law attorney, a financial advisor, and a real estate agent who specializes in senior transitions. Each answers a different set of questions.

One step at a time is okay. There's no wrong place to start.

Sean Froelich, First Team Real Estate, SRES | 714-469-5126 | homeequityforcare.com