

KIM DONAHUE

The Next Season Transition Plan™

A thoughtful guide to downsizing, right-sizing, and deciding what comes next.

CLARITY FOR THE HOME. CARE FOR THE PERSON.

Sarasota • Manatee • Charlotte Counties

WELCOME

A place to begin

Use this guide at your own pace. Circle, check, write, and bring it to our first conversation.

A move later in life can touch every part of daily living: the home, finances, family, routines, friendships, health, and independence. You deserve time to understand your options before you make a decision.

This booklet will help you

- ☐ Name what you want your next season to feel like.
- ☐ Compare staying, right-sizing, and community living.
- ☐ Organize the home, your team, the move, and the first weeks afterward.

Start anywhere. A checked box is a conversation starter, not a commitment to move.

First thought

The change I am considering:

The one thing I most want to protect:

MEET KIM

Why this work matters to me

I am Kim Donahue, a Realtor with Medway Realty and a Real Estate & Transition Advocate serving Sarasota, Manatee, and Charlotte Counties. I have worked in residential real estate for more than three decades, and I moved from Michigan to Sarasota in 2016. I know that a home is never just a transaction.

In this season of my own life, I am choosing to care for myself, serve with the gifts I have been given, and build a life rooted in faith, love, freedom, and joy. That same heart shapes the way I work with clients: I listen first, respect the person behind every decision, and help bring the practical pieces together.

I have also spent meaningful time supporting an older friend through the questions and logistics of a housing transition. It has strengthened my belief that people need a calm advocate and a clear plan when everything feels connected.

My promise: I will treat your next chapter as your decision. My role is to help you see the choices, organize the work, and move forward with confidence.

Your Realtor with a Heart to Serve

THE STAR

The heart of my brand

Five connected ideas shape the way I serve you.

PURPOSE

Help people navigate transition with clarity, compassion, and confidence.

PERSONAL BRAND

A steady advocate who listens to you and coordinates the pieces.

PRODUCT

A personalized Next Season Transition Plan™ for your situation.

PROCESS

Discover → Plan → Prepare → Transition → Thrive.

PROMOTION

Useful education and local guidance that help families know where to begin.

Real estate is one part of the plan. The central question is: What kind of life do you want your home to support next?

THE PROCESS

Five steps to your next season

01 DISCOVER

Listen to your priorities, concerns, timing, and decision-makers.

02 PLAN

Compare realistic options, costs, timelines, and support needs.

03 PREPARE

Sort belongings, choose resources, and prepare the current home.

04 TRANSITION

Coordinate the home sale or purchase, the move, and key handoffs.

05 THRIVE

Settle in, rebuild routines, and check that the new setting works for you.

DISCOVER

Your next season starts with you

There is no single right answer for every person or family.

What matters most?

- ☐ More time with family, friends, or community.
- ☐ Less upkeep, yard work, or home management.
- ☐ Privacy, independence, and familiar routines.
- ☐ Support nearby if my needs change.
- ☐ Freedom to travel, pursue hobbies, or simplify costs.

Questions to discuss

What would an easier day look like?

What feels hardest about making a change?

Who needs to be part of the conversation?

DISCOVER

Stay, right-size, or explore a community?

STAY AND ADAPT

- ☐ Can the home be made safer and easier to manage?
- ☐ What help would I need at home, and what might it cost?

RIGHT-SIZE

- ☐ What size and type of home would fit my life now?
- ☐ Would a smaller home actually reduce monthly costs and work?

EXPLORE COMMUNITY LIVING

- ☐ Which services and activities would I use?
- ☐ How do fees, care options, contracts, and exit terms compare?

A community tour is research. Ask about availability and fees in writing before making a housing or financial commitment.

PLAN

The decision map

For each option, record the facts

Option A and location:

Monthly cost and one-time costs:

What support or amenities are included:

What I gain:

What I give up:

Questions still unanswered:

PLAN

Home and money snapshot

Gather documents before deciding how a home sale fits into the plan.

- ☐ Current mortgage balance, interest rate, and payment.
- ☐ Property taxes, insurance, HOA or condo fees, utilities, and upkeep.
- ☐ A current market analysis and estimated selling costs.
- ☐ Potential purchase or community fees, deposits, and monthly increases.
- ☐ An emergency cushion and a plan for moving expenses.

For tax, legal, lending, insurance, and investment decisions, involve the appropriately licensed professional. Estimates are planning tools, not guarantees.

Advisor or family member to consult:

One financial question I need answered:

PLAN

Build your support circle

Ask permission before sharing private information. Decide who will receive updates and who has authority to make each decision.

My primary decision-maker:

Family or trusted friend to include:

Attorney and financial or tax advisor:

Health or care professional, if needed:

Real estate and moving contacts:

If anyone holds a power of attorney or other formal authority, have an attorney confirm the document applies to the decision at hand.

PLAN

A timeline that fits real life

- ☐ Choose a target move window and identify fixed deadlines.
- ☐ Check lease notice, early termination terms, and community availability.
- ☐ Book tours and collect written fee schedules.
- ☐ Request home-value guidance before setting a budget.
- ☐ Reserve movers and decide who handles utilities and address changes.
- ☐ Build extra time for health, family, and emotional decisions.

Target month:

Nonnegotiable deadline:

My next three actions:

PREPARE

Sort without rushing

Work one room or category at a time. Keep what supports the life you are building.

Five destinations for each item

- ☐ Keep for the next home.
- ☐ Give to family or friends.
- ☐ Sell or consign.
- ☐ Donate.
- ☐ Recycle or dispose safely.

Start with the low-emotion spaces

- ☐ Expired pantry and bathroom items.
- ☐ Duplicate tools, linens, and kitchenware.
- ☐ Paperwork that can be reviewed with the right professional.

Set aside medications, legal papers, photos, heirlooms, and valuables for personal review before any clearing or donation.

PREPARE

Room-by-room checklist

BEDROOM & CLOSET

- ☐ Measure key furniture; edit clothing and linens.

KITCHEN

- ☐ Choose daily essentials; plan pantry and appliance needs.

LIVING SPACE

- ☐ Measure seating, storage, and pathways.

BATH & LAUNDRY

- ☐ Check accessibility and medication storage.

GARAGE & STORAGE

- ☐ Arrange hazardous disposal and sort stored boxes.

PREPARE

Prepare the current home for sale

- ☐ Discuss timing, pricing, and likely buyer expectations.
- ☐ Review repairs for safety, function, and return on effort.
- ☐ Gather permits, warranties, surveys, HOA records, and utility details.
- ☐ Choose what to pack before photography and showings.
- ☐ Create a plan for pets, privacy, valuables, and showings.
- ☐ Review offers and net proceeds with the full terms in view.

The right preparation depends on the home and the market. We will make a plan before spending money on improvements.

PREPARE

Choose the next place thoughtfully

- ☐ Visit at the time of day you would normally be home.
- ☐ Check entrances, lighting, bathroom access, and daily walking routes.
- ☐ Ask what is included, what costs extra, and how fees can change.
- ☐ Observe dining, activities, transportation, and opportunities to connect.
- ☐ Ask about care transitions, guest policies, pets, and termination terms.
- ☐ Talk with residents, if appropriate, and plan a second visit.

Place I want to revisit:

The detail I still need in writing:

TRANSITION

The move coordinator checklist

- ☐ Confirm move date, access, elevators, parking, and insurance requirements.
- ☐ Create a labeled floor plan for furniture placement.
- ☐ Photograph electronics and valuable items before packing.
- ☐ Pack a first-night bag with medications and essentials.
- ☐ Transfer or start utilities, internet, mail, and prescriptions.
- ☐ Keep IDs, keys, contracts, and contacts with you.
- ☐ Confirm the old home is secure and document its condition.

Assign one point person for mover questions on the day. You should not have to direct every box yourself.

TRANSITION

Moving week at a glance

ONE WEEK BEFORE

- ☐ Confirm appointments and payment methods.
- ☐ Pack essentials; refill prescriptions.

MOVING DAY

- ☐ Walk the home with the mover; protect important documents.
- ☐ Check furniture placement, basic utilities, and safety.

FIRST 72 HOURS

- ☐ Locate medical care, groceries, and transportation.
- ☐ Test phones, locks, climate controls, and appliances.

THRIVE

The first 30 days

A successful transition includes feeling at home, not simply arriving.

- ☐ Set up the rooms and daily items you use most.
- ☐ Introduce yourself to a neighbor or join one activity.
- ☐ Schedule regular time with friends and family.
- ☐ Review actual expenses against the plan.
- ☐ Notice what is working and what needs adjustment.
- ☐ Celebrate one thing this new season makes possible.

One connection I want to make:

One change that would help me settle in:

YOUR PLAN

My next three steps

You do not need to finish the entire transition today. Write three actions you can take now, with one person responsible for each.

STEP 1

Action:

Owner and target date:

STEP 2

Action:

Owner and target date:

STEP 3

Action:

Owner and target date:

START THE CONVERSATION

Let's plan your next season together

Whether you are considering a smaller home, independent living, a move closer to family, or simply exploring what may come next, I would be glad to listen. We can start with a complimentary consultation and identify the first practical step for your situation.

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