

Home Transition Options Guide

You have more choices than “stay” or “sell.”

A Home Transition decision is not simply about selling a house. The goal is to identify the housing option that best supports your finances, independence, lifestyle and future needs.

Option 1 — Stay As-Is

Best fit when: home is manageable · costs remain reasonable · strong support network · layout still works · homeowner wants to stay

Investigate: What may become difficult over the next 5–10 years?

Option 2 — Stay + Modify

Examples: bathroom changes · grab bars · improved lighting · ramps · flooring · smart-home technology · lawn/pool outsourcing · home maintenance support

Question: Would modifications make staying easier and safer?

Option 3 — Right-Size to a Smaller Home

Examples: smaller single-family home · villa · townhome

Consider: maintenance · taxes · insurance · accessibility · location · remaining equity

Option 4 — Condo

Consider: exterior maintenance · HOA fees · reserves · assessments · insurance · building rules · accessibility

Community & Rental Options

Option 5 — 55+ Community

Consider: amenities · HOA/community fees · activities · home maintenance · location · restrictions · social environment

Option 6 — Rent

Potential advantages: flexibility · less maintenance · less capital tied to housing

Questions: What is rent likely to cost over time? What services are included?

Option 7 — Move Closer to Family

Consider: support · transportation · healthcare · lifestyle · climate · tax implications · emotional impact



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Support-Based Housing

Option 8 — Independent Living

Private living with varying levels of services, amenities, meals, transportation and social activities depending on the community.

Option 9 — Assisted Living

Residential housing that may provide support with activities of daily living and other services depending on the provider and resident needs.

Option 10 — Continuing Care / Life Plan Community

Some communities may provide multiple levels of housing or care within one system.

Investigate: services · licensing · contracts · entrance fees · monthly fees · healthcare/care availability · refund provisions · financial requirements



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My Options Shortlist



OPTION	WORTH EXPLORING	NOT FOR ME	NEED MORE INFO
Stay as-is	☐	☐	☐
Stay + modify	☐	☐	☐
Smaller home	☐	☐	☐
Villa/townhome	☐	☐	☐
Condo	☐	☐	☐
55+	☐	☐	☐
Rent	☐	☐	☐
Move near family	☐	☐	☐
Independent living	☐	☐	☐
Assisted living	☐	☐	☐
Life Plan / CCRC	☐	☐	☐

My Top Three Options

1. _____
2. _____
3. _____

What I Need to Know Next

1. _____
2. _____
3. _____

You don't need to decide today. You do need enough information to know what choices you actually have.

This resource is for educational and planning purposes only. Tax, legal, financial, insurance, healthcare and eligibility questions should be confirmed with the appropriate licensed professional or government agency.

NEXT STEP

Request a Home Transition Decision Review



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