

WORKSHEET 1

The Options Mapping Worksheet

See the full menu of what is actually available to you

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PURPOSE

Most people narrow their options before they ever look at them clearly. This worksheet walks you through all five real options available to most people in a housing or life transition -- so you can see the full picture before you decide.

BEFORE YOU BEGIN

Think about the decision you are facing right now. Write it here in one honest sentence:

THE FIVE OPTIONS

For each option below, rate your initial reaction (1 = not for me, 5 = this deserves serious thought) and answer the reflection question.

Option 1: Stay and Adapt

Make deliberate changes to your current home so it serves you better in this season.

My initial reaction (circle): 1 2 3 4 5

What specifically is not working about your current home? Could those things be changed without moving?

Option 2: Stay and Leverage

Remain in your home while using its equity to create income, flexibility, or financial security.

My initial reaction (circle): 1 2 3 4 5

Have you explored what your home equity could actually do for you? A reverse mortgage, HELOC, or rental income?

Option 3: Downsize Locally

Sell your current home and purchase something smaller within the same community.

My initial reaction (circle): 1 2 3 4 5

What would you gain if your home were smaller and easier to manage? What would you grieve?

Option 4: Relocate

Sell your current home and move to a different city, state, or community.

My initial reaction (circle): 1 2 3 4 5

If you could move anywhere, where would it be and why? Have you ever run the real numbers on this?

Option 5: Transition to Supported Living

Move into a community that provides structure, connection, or some level of care.

My initial reaction (circle): 1 2 3 4 5

What does supported living actually look like in your area? Have you toured any options recently?

AFTER MAPPING ALL FIVE

Which option surprised you most? Why?

Which option have you been dismissing without fully exploring?

Which option feels most aligned with who you want to be in the next chapter of your life?
