Housing & Transition Readiness Questionnaire

Purpose:

To understand your current living situation, concerns, and goals - so we can identify options that support your needs, whether that means staying in your home safely, downsizing, or transitioning to new housing.

Background & Immediate Concerns
What is your current age? □ Under 65 □ 65-74 □ 75-84 □ 85+
Do you live alone or with someone? □ Alone □ Spouse/Partner □ Family □ Caregiver
What, if any, concerns or challenges are you currently facing related to your living situation? (Check all that apply) Home is too large to manage Financial strain Health or mobility issues Difficulty maintaining home Recent loss or change in family circumstances Unsure of next steps Other:
Current Housing Snapshot
Do you currently own your home? ☐ Yes, mortgage-free ☐ Yes, with mortgage ☐ No
How long have you lived in this home? □ Less than 5 years □ 5–15 years □ 15–30 years □ Over 30 years
What is the current condition of the home? □ Move-in ready □ Needs updates/repairs □ Significant work needed

	Do you feel safe and able to get around your home easily?☐ Yes ☐ Somewhat ☐ No
	Are any of the following challenges present? (Check all that apply) Stairs difficult to navigate Bathrooms not "senior-friendly" Inaccessible kitchen/laundry Risk of falls Lack of railings, grab bars, or ramps Other:
\$	Financial Considerations
	Are you concerned about affording to stay in your home long term? \Box Yes \Box Somewhat \Box No
	If you answered Yes to the above question, would you be open to exploring financial solutions that could allow you to stay in your home longer? ☐ Yes ☐ No ☐ Not sure, need more info
	Which, if any, of the following financial options are you familiar with? (check all that apply) □ Reverse mortgage □ Sale-leaseback (sell home, rent it back) □ Home equity line of credit (HELOC) □ Renting out part of your home
C	Future Housing Goals
	If your current home becomes unmanageable, what would you ideally like to do? ☐ Stay in home with modifications/support ☐ Downsize to smaller residence ☐ Move closer to family ☐ Move to independent or assisted living ☐ Undecided
	What would you say is your timeline for a housing change (if any)? □ Now (0-6 months) □ Soon (6-12 months) □ Longer-term (1+ years) □ No plans, but I'm interested in exploring options

Family Involvement 9 Support
■ Family Involvement & Support
Do you have family or others helping you make housing decisions? ☐ Yes, actively involved ☐ Yes, but not closely involved ☐ No, I manage on my own ☐ I'd like more support
Would you like us to connect with a family member to review findings and options? □ Yes □ No □ Maybe later
What's Next?
Based on your responses to this assessment, Senior Homeowner Advisors can guide you through:
Aging-in-place strategies (e.g., safety assessment, home modifications, maintenance and care referrals)
Home preparation (e.g., decluttering, updates/maintenance, staging)
Financial tools (reverse mortgage, sale-leaseback, etc.)
Real estate planning (downsizing, market analysis, new home search, move

Forward your questionnaire responses to info@seniorhomeowneradvisors.com along with your name and contact information and we'll contact you to start the conversation.

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