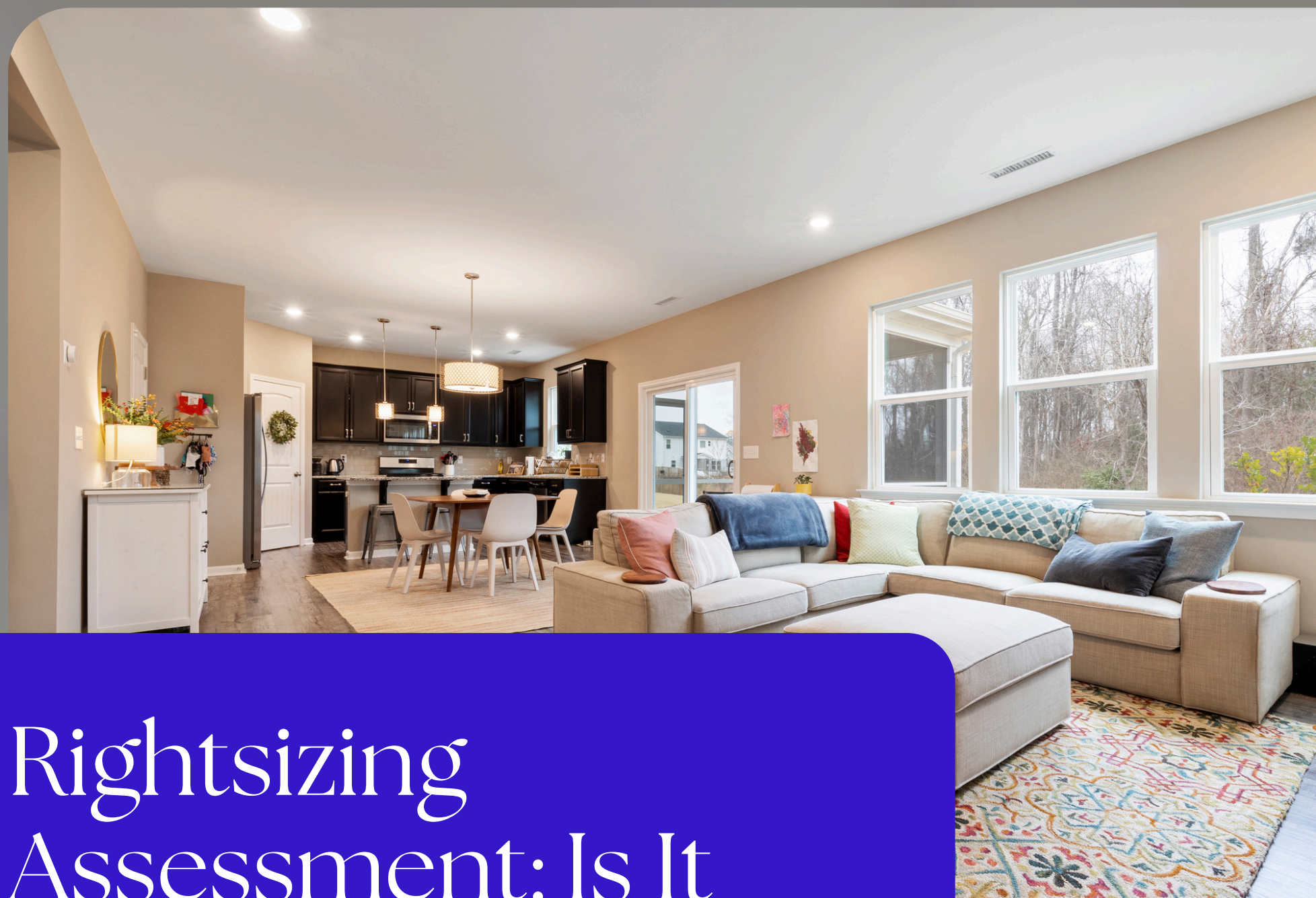




Bob Menzies &
Associates



Rightsizing Assessment: Is It Time for a Change?

Simple Ideas • Beautiful Living
• Modern Comfort



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Introduction

Hey there! If you've been thinking about moving to a home that better fits your life right now, you're not alone. Rightsizing (sometimes called downsizing or "right-sizing") is all about choosing a home that matches your current lifestyle, needs, and future goals — without all the extra space and upkeep you no longer want.

This step-by-step checklist and worksheet will help you evaluate your situation clearly and confidently.



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Step-by-Step Assessment Checklist

How are you using your space today?

Walk through your home and note which rooms you actually use daily.

How often do you use the extra bedrooms, basement, or formal dining room?

Are stairs becoming more difficult? Do you love (or dread) yard work?

Future lifestyle check

What do you want more time and energy for? (Travel, hobbies, family visits, relaxation?)

Do you want single-level living, lower maintenance, or a location closer to amenities?

Practical space needs

Ideal number of bedrooms: _____ (often 2–3 for empty-nesters)

Must-have features: single-story, first-floor laundry, walk-in shower, smaller yard, etc.

Square footage sweet spot: Many people move from 2,500–3,500 sq ft down to a comfortable 1,400–2,000 sq ft.



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Natural Light Is Everything

Natural light opens up the room and lifts mood.
Use sheer curtains, mirrors, and light-reflecting
surfaces to maximize brightness.



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Worksheet Section

Current home pros: _____

Current home cons: _____

Dream home must-haves: _____

Nice-to-haves: _____

Next Steps If several “cons” or maintenance items stood out, it might be the perfect time to explore rightsizing options in Suwanee and nearby areas. Download this checklist, fill it out, and reach out — I’d love to help you explore homes that fit your next chapter!