

# Senior Transition Starting Point Guide

A Gentle First Step for Seniors and Families Navigating Life Changes

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## Welcome

If you're reading this, you may be facing a life change — or thinking ahead to one. This guide is designed to help you pause, reflect, and organize your thoughts before making decisions.

## What Is a Senior Transition?

A senior transition refers to any significant change that affects where or how someone lives as they age. These transitions often involve emotional, practical, and family considerations.

## Step 1: What Is Prompting Change Right Now?

Take a moment to reflect on what led you here.

- Planning ahead
- Health or mobility changes
- Home maintenance feels overwhelming
- Desire to simplify life
- Family concerns or suggestions
- Loss of a spouse or partner
- Not sure — just feeling uncertain

Notes or

thoughts: \_\_\_\_\_  
\_\_\_\_\_

## Step 2: How Are You Feeling About This Transition?

Your feelings matter just as much as the practical details.

Circle any that apply:

- Calm
- Unsure
- Overwhelmed
- Relieved
- Anxious
- Hopeful
- Conflicted

What concerns you most right now?

\_\_\_\_\_  
\_\_\_\_\_



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### Step 3: What Matters Most to You?

Use this section to identify your personal priorities.

Rate each item from 1–5 (1 = not important, 5 = very important):

- Staying independent  1  2  3  4  5
- Feeling safe at home  1  2  3  4  5
- Being close to family  1  2  3  4  5
- Reducing home maintenance  1  2  3  4  5
- Financial comfort  1  2  3  4  5
- Social connection  1  2  3  4  5

Anything else that matters to you?

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### Step 4: Which Options Are You Considering?

You may be thinking about one or more of these paths — or none yet.

- Staying in your current home (aging in place)
- Downsizing to a smaller home
- Moving closer to family
- Exploring senior living or independent living
- Unsure / still learning

There is no need to decide today. Awareness comes first.

### Step 5: Family Conversations

If family members are involved, open communication helps reduce stress.

Consider:

- Who should be part of conversations?
- Are expectations aligned?
- Is anyone feeling rushed or unheard?

Notes: \_\_\_\_\_

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### Step 6: What Support Might Be Helpful?

Support can be educational, emotional, or practical.

- Learning more about options
- Help organizing next steps
- Downsizing guidance
- Transition planning
- A neutral person to talk things through
- Not ready for support yet

All of these are valid.



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## Helpful Educational Resources

You are not expected to do this alone. If and when you're ready, the following **resources are available:**

### **Senior Downsizing Club™**

A free educational resource offering:

- Step-by-step downsizing guidance
- Printable tools and checklists
- Gentle encouragement at your own pace

### **The Senior Move Blueprint™**

A structured educational program for families who want:

- A clear transition roadmap
- Guidance through decision-making
- Support for both seniors and adult children

These resources are available when and if they are helpful.

A Gentle Reminder

You do not need to have all the answers today.

Small steps create clarity.

Taking time to reflect now often prevents regret later.

Need a Thoughtful Conversation?

If you would like to talk through your situation or ask questions, support is available.

Mary Locy

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No pressure. No obligation. Just guidance.



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