



Senior Transition Specialist

SENIOR TRANSITION CHECKLIST

A Step-by-Step Guide for a Smooth Transition

Every step
taken today
creates a smoother,
happier tomorrow.



1 START THE CONVERSATION



- ☐ Talk early and openly with family.
- ☐ Listen to your loved one's wishes and concerns.
- ☐ Discuss goals, fears, and expectations.
- ☐ Agree on next steps together.



Compassionate conversations today create peace of mind tomorrow.

2 ASSESS NEEDS & PRIORITIES



- ☐ Evaluate health, safety, and daily needs.
- ☐ Review medications and medical care.
- ☐ Assess mobility, driving, and home safety.
- ☐ Identify support needed now and in the future.



Knowledge helps you make confident, informed decisions.

3 EXPLORE OPTIONS & RESOURCES



- ☐ Research senior living options.
- ☐ Compare care levels, amenities, and locations.
- ☐ Understand costs and services.
- ☐ Visit communities and ask questions.



The right option supports independence and quality of life.

4 PLAN & PREPARE FOR THE MOVE



- ☐ Declutter and decide what to keep.
- ☐ Sort, donate, sell, or pass down items.
- ☐ Prepare your home for sale (if needed).
- ☐ Create a move plan and timeline.



A thoughtful plan makes the transition less stressful.

5 SETTLE IN & EMBRACE THE NEXT CHAPTER



- ☐ Personalize the new space to feel like home.
- ☐ Get involved in community activities.
- ☐ Build new routines and connections.
- ☐ Celebrate this exciting new beginning!



A new home can lead to a fuller, happier, more meaningful life.

Remember:

You don't have to navigate this alone.



I'm here to guide your family every step of the way with clarity, compassion, and confidence.



Maria Cristina Valencia

Senior Transition Specialist

*Helping Families Navigate
Senior Transitions with
Clarity, Compassion & Confidence*



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COMPLIMENTARY
FAMILY TRANSITION
CONSULTATION



From a Big House to a Fuller Life



SERVING FAMILIES
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