

The 8 Most Important Questions I Will Ask You . . .

When it comes to assisting mature and senior clients with their move, there are a number of important questions that must be asked. In order to help you prepare for our meeting, I offer these 8 questions as a starting point for our conversation when we get together.

1. Do you WANT to move, or do you feel you HAVE to move? There are only 2 broad reasons that seniors consider a move: they WANT to move to be closer to family, shopping, or to downsize. The other broad reason is because they feel they HAVE to move due to health, financial, or other reasons. Discovering the broad reason for your upcoming move will allow me to help you the best I can. If you're not sure whether to move or not, ask me for a copy of my exclusive self-discovery checklist.



2. Have you researched ALL your options? Many people I meet with are amazed at the range of

options they have open to them when it's time to make a move. For those, both homeowner and REALTOR, who do not focus on these options, the array can be overwhelming and add stress to an already emotional time. As an ASA, I am trained and up-to-date on what the options are locally, and have a network of similarly-trained professionals across the country to help you if you're moving out of the area.

3. If you COULD stay in your home, WOULD you? As an Accredited Senior Agent (ASA), I am aware of many programs available to assist seniors in staying in their homes. These range from financial assistance for renovations that make the property more compatible to your changing needs, to in-home health care, meal delivery, and much more. As the availability and details of these programs is constantly changing, you need someone on your side who is in tune with these programs.

4. Who are you getting advice from, about your living situation? Family, friends, neighbours, they all mean well, and chances are they have differing opinions. This often leaves you feeling confused about what is best for you, while you try to keep everyone else happy too. Well, don't worry, I understand how you feel, and believe me when I say that many others in your situation have felt the same way. What they have found, however, is that having a knowledgeable counsellor, such as an ASA, on their side goes a long way towards relieving the stress. At the same time, the ASA training helps me assure your 'advice givers' that you are making good choices for you.



5. Is your Will up to date? Studies consistently show that 48% of Canadians do not have a Will. Of the 52% that do have one, 75% of those Wills are out of date. Getting your Will updated, or having one drafted if you don't have one, will alleviate pressure on you and ensure that your wishes are followed in the future. As an ASA, one of the values I bring to you is a network of exceptional specialists that includes lawyers who specialize in Wills and Estates. These specialists can prepare your Will if need be.

6. Do you have professional advisors? Do you have a lawyer? An accountant? Financial Planner? While everyone's need for these types of professionals is different, there's a good chance that having these types of professionals on your side will not only make things easier for you, and your family, but will save you money too. As we move forwards with you, it is quite likely we will need to interact with one or more of the professionals on your team; it would be really helpful if you could provide us with their names and phone numbers when we meet. If you need a referral to an exceptional specialist, I have some great people I can recommend to you.

7. When was the last time you sold real estate? Things have changed significantly over the years, and they continue to do so. I'll take the time to make sure you are comfortable and informed, so you can make the best decision for you. Even if that means you decide to stay where you are for now. As a counsellor, my primary role is to assist you (and anyone else you want involved) in coming to the best decisions for YOU.

8. What questions do you have for me? When a question pops into your head, jot it down. You'll notice when we sit down together that I will have a list of questions prepared and that I will be taking a lot of notes. I do this to make sure I don't forget anything. I'll even give you a copy of my notes for your convenience and reference.

The Accredited Senior Agent

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