

A photograph of a man and a young girl laughing together on a porch. The man is wearing a grey and blue long-sleeved shirt and blue jeans. The girl is wearing a blue and white striped shirt and tan pants. They are both smiling and laughing. The background shows a white house with large windows.

STEP 1

Determine Your Lifestyle Needs and Goals

This exercise is intended to help you examine the attitudes held by both you and your spouse/partner regarding real estate so you can arrive at more mutually-compatible decisions.

REAL ESTATE PREFERENCES

Using the scale below, write down the number that best describes yourself in the first column. The second column is for your spouse or partner.

SCALE

- ☐ 3 Agree
- ☐ 2 Undecided
- ☐ 1 Disagree

SCORE

42-66

You are strongly real estate oriented.

20-41

You are moderately real estate oriented.

<19

You are doubtful about the role real estate plays in your life.

EXERCISE

I want to live where it's easy to walk to amenities.

I want to live closer to water (i.e. oceans, lakes, rivers).

I want to live close to neighbors.

I want to live further away from neighbors.

I want to live in a more diverse community.

I believe the neighborhood or community we select is as or more important than the home we select.

I believe the lifestyle benefits of where we move is more important than how much our property may or may not appreciate or depreciate.

YOU

PARTNER

EXERCISE

YOU

PARTNER

I believe the abundance of amenities surrounding our property is more important than the square footage.

Dog parks or pet friendly areas are an important part of my decision making process.

Being near families with children is important to me so my children have playmates.

Job opportunities are more important to me than climate considerations.

Being near restaurants and shopping destinations is important to me.

Total

List the five most important factors when considering your next move.

To help you begin to assess the real estate that best matches your lifestyle, we encourage you to consider the following lifestyle factors.

LIFESTYLE PREFERENCES

WHAT I LIKE BEST ABOUT MY PRESENT HOME

YOU

SPOUSE/PARTNER

WHAT I LIKE LEAST ABOUT MY PRESENT HOME

YOU

SPOUSE/PARTNER

WHAT I'D LIKE IN MY NEXT HOME

YOU

SPOUSE/PARTNER

LIFESTYLE CONSIDERATIONS

Check the boxes or
fill in the blanks to
complete this section.

DESIRED QUALITIES

Type of home

(Single family, townhome, condominium, high rise, ranch, farm, resort home, oceanfront, etc.)

Architectural style of home

(Modern, retro, colonial, Cape Cod, etc.)

Living Space

- ☐ Under 1,500 sq. ft.
- ☐ 1,500 to 3,500 sq. ft.
- ☐ 3,500 to 6,000 sq. ft.
- ☐ Over 6,000 sq. ft.

Lot Size

☐ Open Floor Plan

☐ Traditional

☐ Master Suite

☐ Walk-in Closets

_____ # Bedrooms

_____ # Bathrooms

☐ Spa Bathroom

Kitchen

- ☐ Eat-in
- ☐ Standard
- ☐ With Island
- ☐ Commercial-grade
- ☐ Wine Cooler
- ☐ Beverage Center
- ☐ Coffee Station

☐ Separate Family Room

☐ Combined Family/
Kitchen Area

☐ Living Room

☐ Great Room

☐ Den or Home Office

☐ Children's Playroom

☐ Mother-in-Law Suite

☐ Game/Media Room

☐ Exercise Space

Connected Home Features

- ☐ Security System
- ☐ Smart Locks
- ☐ Smart Garage Doors
- ☐ Smart Thermostat
- ☐ Smart Lights
- ☐ Security Cameras
- ☐ Smart Appliances
(refrigerator, dishwasher, etc.)

☐ Solar/Green Features

☐ Fireplace

☐ Wood Stove

☐ Indoor Water Feature

_____ Garage Stalls

☐ Boat Storage

☐ Outbuilding Storage
(for ATVs, kayaks, etc.)

Landscaping

- ☐ Minimal Upkeep
- ☐ Standard
- ☐ High-end Landscaping
- ☐ Hardscaping

☐ Outdoor Kitchen

☐ Pool

☐ Hot Tub

☐ Changing Cabana

☐ Patio

☐ Decks

LIFESTYLE CONSIDERATIONS (CONTINUED)

NEIGHBORHOOD

- | | |
|--|---|
| <input type="checkbox"/> Great Schools | <input type="checkbox"/> Ethnic Restaurants |
| <input type="checkbox"/> Quality Healthcare | <input type="checkbox"/> University Town |
| <input type="checkbox"/> Jogging/Cycling Paths | <input type="checkbox"/> Performing Arts Center |
| <input type="checkbox"/> Parks, Plazas, Green Space | <input type="checkbox"/> House of Worship |
| <input type="checkbox"/> Public Sports Fields | <input type="checkbox"/> Tranquil and Serene |
| <input type="checkbox"/> Walk to Shops | <input type="checkbox"/> Always Buzzing |
| <input type="checkbox"/> Sailing | <input type="checkbox"/> Family Friendly |
| <input type="checkbox"/> Tennis | <input type="checkbox"/> Public Transportation |
| <input type="checkbox"/> Golf | <input type="checkbox"/> Proximity to Airports |
| <input type="checkbox"/> Historic District | <input type="checkbox"/> Proximity to Work |
| <input type="checkbox"/> Nightlife and Entertainment | <input type="checkbox"/> Community Events |
| <input type="checkbox"/> Music Venues | <input type="checkbox"/> Block Parties |
| <input type="checkbox"/> Fine Dining | |

Other Important Community Amenities:
