CONSIGLIERE GROUP

Your Trusted Advisor

The Consigliere Family Transition Guide

A Practical Guide to Housing, Downsizing, and Senior Living Decisions.

Real Estate Expertise. Senior Housing Knowledge. Compassionate Guidance.

Free educational guidance. Keep completed worksheets and private documents secure.

Consigliere Group provides real estate services, senior housing education, relocation coordination, and introductions to third-party resources. We do not provide medical diagnoses, clinical placement determinations, legal advice, or financial planning services. Families should consult qualified professionals regarding care, legal, and financial decisions.

Damiano Raigoza-Sartoresi | Managing Director | Senior Transitions & Housing Advisor

A descriptive service title, not a certification.

Your Family’s Senior Transition Roadmap

1. Identify goals and current housing concerns

- Write down what matters most: familiar surroundings, upkeep, location, and independence.

- Separate housing questions from care questions that need a qualified professional.

- Choose the decisions that need attention first; not everything needs to happen at once.

2. Discuss preferences with the older adult and authorized family members

- Ask what the older adult wants to keep, change, and control.

- Agree on a family contact and who is authorized to participate.

- Keep private documents and personal information off public forms.

3. Explore possible housing and care settings

- Compare staying at home, independent living, assisted living, and other settings.

- Ask providers about licensing, services, staffing, accessibility, and admission requirements.

- Tour options when practical; a website does not determine appropriate care.

4. Consult qualified care and financial professionals as needed

- Ask healthcare professionals about care needs and discharge requirements.

- Discuss ownership, authority, estate matters, and taxes with an attorney and tax professional.

- Review affordability with a qualified financial professional before committing.

5. Evaluate the family home's real estate options

- Compare selling as-is, targeted preparation, and timing alternatives.

- Review market value and property obligations with your real estate advisor.

- Verify who has legal authority to sign before beginning a sale.

6. Develop a transition budget and timeline

- List moving, housing, storage, sale, and overlapping expense estimates.

- Obtain written provider quotes and ask about deposits, refunds, and extra charges.

- Allow flexibility for escrow, provider availability, and family decisions.

7. Coordinate property preparation, relocation, and housing arrangements

- Choose insured vendors and review written agreements.

- Confirm move dates, access arrangements, and essential belongings.

- Coordinate family communication only with appropriate authorization.

8. Complete the move and organize remaining housing tasks

- Confirm utilities, mail forwarding, keys, and important contacts.

- Keep agreements and closing documents in a secure place.

- Review remaining property tasks and ask the appropriate professionals about unresolved questions.

Housing transition checklist

[ ] Clarify the older adult’s preferences and priorities.

[ ] Confirm authorized decision-makers and communication preferences.

[ ] Compare housing settings, location, accessibility, and support.

[ ] Obtain written estimates and create a flexible timeline.

Questions for senior living communities

[ ] What license does this location hold?

[ ] Which services are included and which cost extra?

[ ] What staffing, transportation, activities, and visitor policies apply?

[ ] What are the admission, reassessment, refund, and discharge terms?

Property sale preparation checklist

[ ] Confirm ownership and legal authority with your attorney.

[ ] Gather mortgage payoff and property obligation information privately.

[ ] Compare as-is and targeted preparation options.

[ ] Review estimated proceeds, negotiated compensation, and closing timing.

Moving and relocation checklist

[ ] Choose what to keep, gift, donate, sell, or store.

[ ] Measure the new home and plan essential furniture.

[ ] Compare written vendor estimates, insurance, and cancellation terms.

[ ] Arrange utilities, mail, keys, and a first-week essentials bag.

Questions for attorneys and financial advisors

[ ] Who has authority to sign property and housing documents?

[ ] Do trusts, probate, or other estate matters affect timing?

[ ] What tax consequences should be reviewed before a sale?

[ ] How should housing costs and longer-term affordability be evaluated?

Housing options comparison worksheet

[ ] Option / location: _____

[ ] License and services verified: _____

[ ] Monthly cost / one-time fees: _____

[ ] Accessibility / transportation: _____

[ ] Questions and next steps: _____

Ask qualified professionals to evaluate care needs, legal authority, taxes, and affordability.

Important document organization checklist

[ ] Store identification, property records, agreements, and professional contacts securely.

[ ] Organize insurance and authorized-representative documents with the appropriate professionals.

[ ] Record where originals are kept and who may access them.

[ ] Never send medical records or account numbers through a public website form.

Family planning conversation guide

[ ] What would make this next chapter feel right to you?

[ ] What do you want to keep doing independently?

[ ] Who would you like involved, and what can be shared?

[ ] What can wait, and what is our next agreed step?

A thoughtful next conversation

The older adult's preferences, independence, and authorization come first. No admission, sale price, coverage, provider availability, or clinical outcome is guaranteed.

Verify residential care information with California CDSS:
cdss.ca.gov/inforesources/community-care-licensing

Verify skilled nursing facility information with California CDPH: cdph.ca.gov (Cal Health Find)

Find community services: aging.ca.gov

Request a housing conversation: consiglieregrp.com/senior-transitions/consultation

Virtual consultation scheduling: ZoomWithDamiano.com

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