



HOME MOVE REPORT

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INTRODUCTION

Welcome to your Sage & Elder Home Move Report. The purpose of this report is to provide you with a framework to understand your requirements and the possibilities open to you when looking for a new home.

Within this report you will find a summary of your current home, an outline of your requirements and restrictions for a move and next steps to take. We have conducted a market appraisal to help value your property and give you clearer parameters on what you might achieve from a house sale. We have also laid out suggestions of potential new homes that would suit your downsizing needs.

I hope you find this report helpful and informative. At the end of the report I will introduce the comprehensive support that Sage & Elder can offer to guide you in the process of moving to your new home. I would love to work with you further and support you through your downsizing journey.

Let's begin...



ABOUT MARY

In this section we will give a summary of you, your lifestyle and what is important to you, taken from our discussions when we met.

This will include information about where you currently live, your family, hobbies and interests.

This information will allow you to take an objective view of the parts of your life that matter the most to you, and what can and cannot change with a move.

It will also help us formulate a clear picture of what is important to factor into a move and what might need considering, things that you may not realise are important until we put it down on paper.

WELLBEING

Here we will talk about any factors affecting your wellbeing

EXAMPLE HOME MOVE REPORT

LIFESTYLE

Here we will talk about your lifestyle and what might be important to consider when making a move.

CONCERNS FOR THE FUTURE

Here we will talk about any concerns you may have and what we need to consider in the future.

EXAMPLE HOME MOVE REPORT

INCOME

Before starting on your home moving journey, it is essential to be clear on your financial position to ensure you can make decisions which give you the most security and flexibility possible. Use the space below to make a note of your key income figures.

INCOME:

£

PENSIONS:

£

SAVINGS

£

FINANCIAL CONSIDERATIONS

1. Do you have financial obligations outside of running your home which will not change if you move house?
2. Do you have savings or investments that would need to be accessed as part of a move?
3. Has your home got any equity release or mortgage restrictions in place?

THINGS TO THINK ABOUT

TAKE SOME TIME TO CONSIDER THE FINANCIAL IMPLICATION OF MOVING. WE RECOMMEND GETTING INDEPENDENT FINANCIAL ADVICE BEFORE MAKING ANY COMMITMENT REGARDING A NEW HOME. IF YOU DO NOT CURRENTLY HAVE A FINANCIAL ADVISOR, WE CAN HELP YOU FIND ADVISORS WHO UNDERSTAND AND ARE SENSITIVE TO THE CONSIDERATIONS AROUND FINANCIAL SECURITY IN LATER LIFE.



YOUR CURRENT HOME

Here we will give an overview of your home and what makes it special. This will be information that your selling agent should understand about your home and what you love about it.

This section will feature important information about the location of your home and the surrounding areas.

We will highlight why you have loved living in your home and what a future buyer will love about your home.

When we meet we will talk to you about your home and get information about its history, position and features. We will also speak to local agents and do our own research about your property to create a useful summary.

ADDRESS: HOME, SAGE STREET, BATH

PROPERTY DESCRIPTION

Here we will have a summary of the facts about your house. This will include number of bedrooms, size and anything that agents will use to give a summary on listings

- no bed, no bathroom
- detached
- square ft
- garden
- parking and garage
- EPC

If your property has been previously been valued, or is currently on the market we will use this space to give an overview here.



PROPERTY RUNNING COSTS

When considering a home move, it is helpful to understand your current property running costs and how these might compare to your future home's costs, especially if you are considering moving to a property with additional support, or with facilities you may have service charges to pay. By understanding your current outgoings you can make an accurate assessment as to affordability and changes to living costs when selecting a new home.

Use the space on the next page to fill in your current costs. This will be a good reference point when you come to look at future home options.

Sage & Elder will never give financial advice or recommend a financial decision. If you need support reviewing your finances we can facilitate you getting support from a trusted and appropriate financial advisor.



CURRENT HOUSEHOLD COSTS

COST: MONTHLY: ANNUALLY:

MORTGAGE:

COUNCIL TAX:

GAS/OIL:

ELECTRICITY:

WATER:

INSURANCE:

TELECOMS:

MAINTENANCE:

GARDENING:

OTHER COSTS:

TOTAL:

PROPERTY APPRAISAL

We will put together an appraisal of your property based on local knowledge, research and speaking with agents.

We will summarise the key attributes which will positively impact on your valuation:

- reasons
- reasons
- reasons
- reasons

However, in appraising your value, we will also taken into account the factors which may limit your valuation:

- reasons
- reasons
- reasons
- reasons

Our appraisal will take an informed approach and will not just look at local comparable properties. We will consider who might be best suited to your property and compare against properties that they will also be looking at.

This appraisal was conducted on 1st September 2025

PROPERTY APPRAISAL

We will compare your property to others in the local area who will be viewed by people also looking at your location.



EXAMPLE 1

£PRICE

KEY FEATURES

DATE OF LISTING



EXAMPLE 2

£PRICE

KEY FEATURES

DATE OF LISTING



EXAMPLE 3

£PRICE

KEY FEATURES

DATE OF LISTING



EXAMPLE 4

£PRICE

KEY FEATURES

DATE OF LISTING

PROPERTY APPRAISAL

We also compare to a wider area or other areas that the same buyers might be looking in to ensure a comprehensive valuation.



EXAMPLE 1

£PRICE

KEY FEATURES

DATE OF LISTING



EXAMPLE 2

£PRICE

KEY FEATURES

DATE OF LISTING



EXAMPLE 3

£PRICE

KEY FEATURES

DATE OF LISTING



EXAMPLE 4

£PRICE

KEY FEATURES

DATE OF LISTING

WHAT WE THINK YOUR PROPERTY IS WORTH

We at Sage & Elder will assess your local housing market, reviewed previously sold prices, and taken advice from local agents to get an understanding of what your property will be worth to potential new owners. In addition, we will take into consideration the type of property you have and the considerations buyers will have when making a decision to purchase.

With this in mind, we will give you a property valuation range to help you understand what your house is worth.

HOW MARKET APPRAISALS ARE CALCULATED

We have reviewed your property alongside other properties currently on the market, previously sold prices in your area and market conditions and used this information to calculate an idea of a valuation range for your property. This draws on our expert understanding of the complexities of factors affecting property valuations. This appraisal is designed to give you an objective initial overview of your potential property value, and is not in place of getting three local agent valuations prior to going on the market. There may be a difference in valuations from agents for a variety of reasons. Should you decide to employ our full move management services, we will seek comprehensive valuations from agents before guiding you on the right price to market your property at and be able to explain any variation from this valuation.



WHAT CAN YOU DO TO IMPROVE YOUR VALUATION/CHANCES OF SELLING?

If you would like to achieve a higher price for your property, or increase the speed of selling your property, there are several steps you can take. We have put together a list of ideas for your consideration.

EASY STEPS YOU CAN TAKE

- Step 1
- Step 2
- Step 3
- Step 4
- Step 5

FURTHER STEPS YOU CAN TAKE

- Step 1
- Step 2
- Step 3

YOUR REQUIREMENTS

Here we will talk about your requirements for a new home.

After meeting with you we will put together a clear idea of your must haves and desires for a new home.

This will include locations you are interested in living, types of properties that you are interested in, but also that will suit your requirements and needs. It will take into consideration everything we have understood about your needs but also things that you may not have considered for the future.

This will create the foundation for your property search and provide you with a useful framework to start speaking to agents in your selected areas.

EXAMPLE HOME
MOVE REPORT

EXAMPLE HOME
MOVE REPORT

CONSIDERATIONS

We recommend that you select a home which is at no more than 70% of your current homes value to ensure you release enough equity to cover your moving costs and give you comfort for the future. If you have equity release, lending or obligations to family members, this will need to be taken into account when setting a purchase price budget.

Based on your expected sale price and other information that you have shared with us, we will give you a recommended budget range for your purchase search.

TYPES OF PROPERTY TO CONSIDER

Based on the information you have given us, we will advise you on types of properties to consider when searching for a new home. We will suggest locations and types of properties to consider.

RENTING OR BUYING?

ARE YOU LOOKING TO PURCHASE A NEW PROPERTY OR WOULD YOU BE OPEN TO CONSIDERING RENTING? SAGE & ELDER CAN TALK THROUGH THE PROS AND CONS OF RENTING COMPARED TO BUYING AND SIGN POST YOU TO RELEVANT FINANCIAL ADVISORS WHO CAN HELP YOU CONSIDER THIS AS AN OPTION.

YOUR OPTIONS

We have done an initial search for available properties which match your requirements. Below are some suggestions of what is currently available on the market which might suit your needs.

You can take this information to guide your search or, if you decide to work further with Sage & Elder, we will talk in detail about what you are looking for, speak to relevant agents and developers about what they have coming onto the market and conduct initial viewings on your behalf if appropriate.

TYPE OF PROPERTY 1

Description of type of property, features and budget range.

Below we will give a few examples of properties currently on the market with price points



SAGE AVENUE
£XXX,XXX

ELDER CLOSE
£XXX,XXX

SAGE CLOSE
£XXX,XXX

A SELECTION OF PROPERTIES AND REASONS WHY THEY WOULD BE WORTH CONSIDERING

TYPE OF PROPERTY 2

Another type of property that you might wish to consider.

This section is entirely personalised so if you have very specific requirements it may not offer types of property, but rather specific examples or initial research done.



EXAMPLE HOME
MOVE REPORT

EXAMPLE PROPERTY

£XXX,XXX

AN ILLUSTRATION OF ANOTHER TYPE OF
PROPERTY WORTH CONSIDERING.

TYPE OF PROPERTY 3

Another type of property that you might wish to consider.

This section is entirely personalised so if you have very specific requirements it may not offer types of property, but rather specific examples or initial research done.



EXAMPLE HOME
MOVE REPORT

NEW BUILD IN CHEDDAR

£620,000

AN ILLUSTRATION OF ANOTHER TYPE OF
PROPERTY WORTH CONSIDERING.

NEXT STEPS

WHAT YOU NEED TO DO	HOW SAGE & ELDER CAN HELP
Get valuations on your property	Contact agents on your behalf, discuss valuations and ensure the agents are the best choice for you
View potential new homes	Conduct initial research, fact finding and arrange viewings. Attend viewings, ask the right questions and ensure you are seeing the right properties
Instruct an agent, get photos taken & go on the market	Work with your chosen agent to ensure particulars reflect your property in the best possible way. Assist with staging and presenting property. Support viewings on your property where needed.
Narrow down your choice of new home	Talk through options, arrange & support/attend second viewings, ensure all questions are answered and you have all of the information you need to make the right choice
Make an offer on your new home	Negotiate with developers or sellers to get the best possible price on your selected property
Negotiate the sale of your home	Regularly check in with agents, negotiate the best offer on your property and do due diligence to ensure you get the right buyer
Instruct a solicitor on the legal work/review documents	Get quotes on legal work, regularly check in on progress, assist with completing property forms and answering enquiries

Complete legal work & Sign documents	Support with ensuring all legal work is completed fully and satisfactorily
Declutter and downsize your belongings	Advice and support with downsizing. Assist with finding downsizing services, hiring skips or getting auctioneer quotes
Find a removals company	Get quotes and assist with planning for removal services
Plan your move day	Help plan and organise the removal day to ensure everything runs smoothly
Organise furnishing/improvements to new home	Help to plan, get quotes and organise what you need for your new home including curtains, improvements and alterations
Make the move	Be there on the move day to support, help remember the kettle and give you any encouragement you require
Enjoy your new home	No more help needed here

ABOUT SAGE & ELDER

Sage and Elder Home Move Specialists offer expert home moving support for people over the age of 60. Bringing years of knowledge, trusted networks, and calm expertise we will help you at every stage of a home move in later life.

Our property finding services allows you to leave all of the research and searching to us, knowing the right questions are being asked and saving you time and money in finding a suitable new home. We will research, visit and negotiate on your behalf.

Our home move management service will give you comprehensive support and guidance through all of the practical elements of selling your home, purchase a new home and coordinating the move, ensuring the right professionals are instructed and timelines are managed with ease.

Your dedicated home move specialist understands the complexities of moving home in later life, and offers personal, empathetic support, expert advice, and tailored solutions that make the moving process as smooth and stress-free as possible.



HOW MUCH DO MY SERVICES COST?

At Sage & Elder we will always be completely transparent about what our services included and what fees are involved with working with us.

We offer a set fee for our full home move management and property finding services which will not change once agreed, even if your move process takes longer or is more complicated than initially expected.

The fees we charge depend on your requirements and situation but will be laid out in full before you make any commitment to work with us. By negotiating on your behalf and helping you get the best possible value from your sale, our services save you time and money.

The cost of this report will be deducted from any future fees.

WHAT NEXT?

We would love to work with you to produce your own personalised Home Move Report.

1. Arrange a free, no obligation call to speak to our home move specialists
2. Book a time to meet with your home move specialists to discuss your potential move and gather all the information we need to create your report
3. We will put together your report for you
4. We will arrange a call or meeting to discuss your report and discuss next steps.



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