

MOVE TO THE PLACE OF YOUR DREAMS

A Relocation Handbook

WORKSHEETS

This PDF includes worksheets from the book, *Move to the Place of Your Dreams: A Relocation Handbook* and is intended as a companion to the book.

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WORKSHEET: WHY YOU WANT TO MOVE

Search your feelings and desires to come up with all the reasons why you think you want to move:

Name all of your concerns and fears about moving:

WORKSHEET: OBJECTIVES FOR THE MOVE

To help you understand your objectives, review your reasons for moving and express those desires in terms of objectives. What do you expect to find by relocating?

Objective

e.g., Find a better paying job

Value that influences this

Financial security

WORKSHEET: CRITERIA

Use this worksheet to rank your main criteria for a new place. Group your criteria into sections based on what's important to you.

e.g., Location: Near a major airport

e.g., Climate: Warm winters

Must Haves—critical needs for your new home

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Should have—what you would really like to have in your new home

9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____

Nice to have—what you could have if possible

- 17. _____
- 18. _____
- 19. _____
- 20. _____
- 21. _____
- 22. _____
- 23. _____
- 24. _____

Must not have—things that are completely undesirable to have in your new home

- 25. _____
- 26. _____
- 27. _____
- 28. _____
- 29. _____
- 30. _____
- 31. _____
- 32. _____

WORKSHEET: PRE-VISIT PREP

Before visiting your potential new home, identify as clearly as possible any preconceptions that you can validate (or correct) and questions you can answer. Look into each preconception and question and write down what you find out. Complete this worksheet for each place you're seriously considering, regardless of whether you are able to visit.

Place: _____

Dates Visited: _____

Here are things I think about the place I'm visiting—I'll try to find out if these are true:

*e.g., Preconception: Traffic is terrible;
What I found: Rush hour traffic is heavy in some areas*

1. Preconception _____

What I found: _____

2. Preconception _____

What I found: _____

3. Preconception _____

What I found: _____

4. Preconception _____

What I found: _____

5. Preconception _____

What I found: _____

6. Preconception _____

What I found: _____

7. Preconception _____

What I found: _____

8. Preconception _____

What I found: _____

Here are questions I have about the place I'm visiting—I'll try to answer these:

e.g., How much does a three-bedroom, two-bath home there cost?

What I found: There are many options from \$200,000 to \$240,000

1. Question: _____

What I found _____

2. Question: _____

What I found _____

3. Question: _____

What I found _____

4. Question: _____

What I found _____

5. Question: _____

What I found _____

6. Question: _____

What I found _____

7. Question: _____

What I found _____

8. Question: _____

What I found _____

WORKSHEET: POST-VISIT EVALUATION

After visiting a location that you like, fill out this worksheet.

Place: _____

Dates Visited: _____

- My favorite part of town was:

- My least favorite part of town was:

- The people seemed:

- The weather was:

- When I was there, I felt:

- The most surprising thing was:

- The most pleasant sight was:

- The most concerning thing was:

- My biggest concerns about living there would be:

- The most appealing aspect about living there would be:

- These are some of the key differences from what I'm used to:

- _____
Could I get used to this? Circle one: Yes No Maybe

- _____
Could I get used to this? Circle one: Yes No Maybe

- _____
Could I get used to this? Circle one: Yes No Maybe

- _____
Could I get used to this? Circle one: Yes No Maybe

- _____
Could I get used to this? Circle one: Yes No Maybe

- _____
Could I get used to this? Circle one: Yes No Maybe

- _____
Could I get used to this? Circle one: Yes No Maybe

WORKSHEET: CRITERIA EVALUATION

Rate the options to compare them in terms of the top criteria you identified earlier.

1. List your criteria from Chapter 3 in the *Criteria* column.
2. Assign a weight in the *Weight* column for each criterion based on how you prioritized them earlier:
 - a. For “must-haves” or “must not have” assign a weight of 10
 - b. For “should have,” assign a weight of 4
 - c. For “nice-to-haves,” assign a weight of 1
3. Write the names of the places you’re considering moving to in the top row boxes that say “Place A,” “Place B,” etc.,
4. This part is where your research comes in. For each place you’ve identified, go down the list of criteria and write in a numerical rating:
 - 1 = unsatisfactory
 - 0 = acceptable
 - 1 = meets expectations
 - 2 = exceeds expectations
5. Once your sheet is completely full of criteria and numbers, then you can use the numbers to determine total scores. Go row by row and multiply the weight of each criterion by the rating you’ve entered. Then add up all these numbers for each location.
6. The place with the highest score is the one that best meets your criteria. If there are close competitors, follow other suggested decision-making exercises to validate your top choice.

CRITERIA	WEIGHT	PLACE A	PLACE B	PLACE C
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
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15.				
16.				
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21.				
22.				
23.				
24.				
25.				
26.				
27.				
28.				
29.				
30.				
31.				
TOTAL SCORES				

WORKSHEET: DECONSTRUCT CONCERNS

This worksheet can help you sort through your fears in the early stages of considering a move or if you're trying to make a final decision on where to live.

Concerns

Possible ways to validate and address concerns

e.g., The job market is tough

I will be sure to get a job there before I move

e.g., I won't fit in

I will visit beforehand and talk to people

e.g., Homes are too expensive

I will look into actual costs with a roommate

1. Concern _____

Ways to validate and address concern _____

2. Concern _____

Ways to validate and address concern _____

3. Concern _____

Ways to validate and address concern _____

4. Concern _____

Ways to validate and address concern _____

5. Concern _____

Ways to validate and address concern _____

6. Concern _____

Ways to validate and address concern _____

7. Concern _____

Ways to validate and address concern _____

8. Concern _____

Ways to validate and address concern _____

WORKSHEET: ACKNOWLEDGE YOUR EMOTIONS

Things I'm worried about

I'm worried because

Things I'm excited about

I'm excited because

WORKSHEET: RISK MITIGATION PLAN

Write down all your fears and how you would address them.

What could go wrong	Impact	Likelihood	How I can respond
	H / M / L	H / M / L	
_____	□ □ □	□ □ □	_____
_____	□ □ □	□ □ □	_____
_____	□ □ □	□ □ □	_____
_____	□ □ □	□ □ □	_____
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_____	□ □ □	□ □ □	_____
_____	□ □ □	□ □ □	_____

WORKSHEET: YOUR PLAN

Fill in this template to help you plan your move step-by-step. Write in your own steps and timeline and check off items as you complete them.

	STEP	HOW LONG TO START BEFORE MOVE	DURATION
EMPLOYMENT			
Prepare for job search			
Find jobs			
Accept a job			

	STEP	HOW LONG TO START BEFORE MOVE	DURATION
NEW HOME			
Prepare for home search			
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
Find homes			
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
The transaction			
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	<input type="checkbox"/>		

	STEP	HOW LONG TO START BEFORE MOVE	DURATION
PLANNING HOW YOU'LL MOVE			
Possessions			
<input type="checkbox"/>			
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<input type="checkbox"/>			
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People			
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<input type="checkbox"/>			
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SAYING GOODBYE			
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	STEP	HOW LONG TO START BEFORE MOVE	DURATION
ARRIVE AND MOVE IN			
When you arrive			
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<input type="checkbox"/>			
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Move In			
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WORKSHEET: YOUR BUDGET

Use this template to budget for your expenses throughout the moving process. There is a “contingency” line item—basically a fudge factor—recognizing that you can’t anticipate everything and it won’t all go smoothly, so expect a little more expense than you can predict. At the same time, track your actual costs to see whether you’re staying within your budget and can still afford the remaining steps of your relocation.

EXPENSE	ESTIMATED COST	ACTUAL COST
EMPLOYMENT		
NEW HOME		

EXPENSE	ESTIMATED COST	ACTUAL COST
PLANNING THE MOVE		
SAYING GOODBYE		

EXPENSE	ESTIMATED COST	ACTUAL COST
ARRIVE AND MOVE IN		
SUBTOTAL		
Contingency factor (add 10% of subtotal)		
TOTAL		

WORKSHEET: EVALUATING A NEIGHBORHOOD

Fill out this worksheet for each neighborhood you consider. The criteria in this worksheet are grouped by “Proximity” and “Area.”

1. Fill out the *Weight* column to indicate the importance of each aspect of a neighborhood. These values will be the same for each neighborhood you evaluate:

0 = not relevant or not applicable

1 = nice to have

2 = desirable

3 = critical

2. Fill out a numerical *Rating* for each aspect of the neighborhood you’re evaluating:

-1 = unsatisfactory

0 = acceptable

1 = meets expectations

2 = exceeds expectations

3. Calculate a *Score* for each row by multiplying the *Weight* value by the *Rating* value.
4. Add up the *Score* values for each section and write-in the total value at the bottom of each part of the worksheet.
5. As you complete this worksheet for different areas, hone in on neighborhoods with the highest total scores.

Neighborhood: _____

PROXIMITY: HOW CONVENIENTLY LOCATED IS THIS TO OTHER PLACES IN YOUR DAILY LIFE?			
TOPIC	WEIGHT	RATING	SCORE
Transportation: How easy is it to get around from here? Look at things like walkability, sidewalk infrastructure, bike paths, transit service, traffic levels, availability of street parking, and convenience to the freeway.			

TOPIC	WEIGHT	RATING	SCORE
Workplace: How far away would you be from work? Do you want a 30-minute commute to help clear your head after work, or would you like to be so close that you can walk home for lunch? (Look into the commute; a ten-minute drive on Sunday afternoon could take several times as long during rush hour.)			
Schools: How close is your university or how good are the schools where your children would go? School district boundaries can seem arbitrary, so make sure you know where the border is. Even if you don't have children, the quality of a school district can affect the resale value of your home.			
Grocery store: Is there a store nearby for regular shopping or a corner store for pantry staples?			
Services: Can you perform errands easily, like going to the bank, dropping off a library book, or getting your nails done?			
Communications: Are you within reliable cell phone coverage? Do the networks that are important to you (e.g., DSL, cable, or fiber) reach the area?			
Health care: From here, could you get to a hospital quickly in case of an emergency? Are there doctor's offices, medical clinics, or hospitals nearby?			
Restaurants: Are there restaurants around that serve the types of food you like in the price range you're looking for?			
Coffee shops: Is there a place nearby to grab your morning latte or where you can spend an afternoon on your laptop?			
Bars: Are there places where you would feel comfortable going for a drink after work or meeting up with friends?			
Parks and Recreation: Look for neighborhood parks you can stroll through and playgrounds for your little one. Is there a community center or beach nearby?			
Entertainment: How far are you from a movie theater, performing arts center, or sports arena?			
Shopping: Do you make frequent trips to home improvement stores or the mall?			
Other: List other things you'd like to be conveniently located to:			
Other:			
Other:			
Other:			
Other:			
PROXIMITY TOTAL SCORE			

AREA: HOW DESIRABLE IS THE NEIGHBORHOOD?			
TOPIC	WEIGHT	RATING	SCORE
Safety: Would you be comfortable walking this neighborhood at night? Will metal bars be needed on your windows? Are the roadways particularly dangerous? Look up “Meghan’s Law” to see if any sex offenders live here.			
Character and Aesthetics: Is it important to you to have local establishments, old homes, historical architecture, or mature trees nearby? What is unique about the neighborhood? Are homes and yards well maintained?			
Neighborhood demographics: Who lives here? Are neighbors retired or families with teenage children? Could you be comfortable living with the people in the area?			
Affordability: Are these homes within your price range? Even if the average price is too high for you, could you possibly find a smaller home or fixer-upper that would work?			
Area Trajectory: Your neighborhood will change over time. Is this area on an upswing or downward trend? Try to learn the city’s plans for the area. How is it zoned? Are there buildings under construction? Will road widening or new highway construction slice through the neighborhood or create more traffic?			
Other: List other things that are important characteristics of your neighborhood:			
Other:			
Other:			
Other:			
Other:			
NEIGHBORHOOD TOTAL SCORE			

WORKSHEET: EVALUATING A HOME

Fill out this worksheet for each home you're interested in. The worksheet is divided into sections of "Basic needs," "Comfort and lifestyle," "Home unit," and "Systems."

1. Fill out the *Weight* column to indicate the importance of each aspect of a house. If you're planning to buy, share the worksheet with your realtor to help him or her find the right place for you. These values will be the same for each home you evaluate.

0 = not relevant or not applicable

1 = nice to have

2 = desirable

3 = critical

2. Fill out a numerical *Rating* for each aspect of the neighborhood you're evaluating:

-1 = unsatisfactory

0 = acceptable

1 = meets expectations

2 = exceeds expectations

3. Calculate a *Score* for each row by multiplying the *Weight* value by the *Rating* value.
4. Add up the *Score* values for each section and write-in the total value at the bottom of each part of the worksheet.
5. Choose a home with high total scores.

Address: _____

Home Description: _____

Date Visited: _____

BASIC NEEDS: HOW WELL DOES THE HOME MEET YOUR FUNDAMENTAL NEEDS?			
TOPIC	WEIGHT	RATING	SCORE
Base cost: What will you have to pay either to purchase the place or for your monthly rent payment?			
Repair and maintenance cost: Does this place require significant repairs? If you buy it, do you expect there to be high ongoing maintenance costs?			
What's included: A high cost can be a good value if utilities, appliances, or furniture are included. Are there parking fees or a neighborhood association you're required to join?			
Safety: Is the place itself safe? Look for deadbolt locks on all the external doors. Is exterior lighting adequate? Does the building adhere to current fire codes and seismic standards? If renting, is there a sprinkler system in the building? Is safe parking included?			
Lease term: Do you want to stay for a year, or would you rather have the flexibility to leave after six months?			
Other: List other things you'd consider basic needs:			
Other:			
Other:			
Other:			
Other:			
BASIC NEEDS TOTAL SCORE			

COMFORT AND LIFESTYLE: HOW SUITABLE IS THIS HOME FOR THE WAY YOU LIVE?			
TOPIC	WEIGHT	RATING	SCORE
Yard, Outdoors, and View: Consider what you see out of the kitchen window: nature, a city skyline, a street, a brick wall, or a nice big yard? Is there a place to garden? Are trees in good health? Will grass be easy to mow? Is there a deck or balcony? Will you have access to a swimming pool?			
Quiet: Ask neighbors about noise before you commit. Even if this is a quiet area, sit down and listen—what do you hear? Do some neighbors drive loud motorcycles? Are there children? Does your neighbor mow the grass at 6am? Visit at a few different times of day if you can.			
Aesthetically pleasing: Does the place look good? Are the finishes nice? Is the architecture appealing? If in a condo or apartment building, are the public spaces clean?			
Recreation: Does the apartment building have recreation options or a community room? Does the subdivision include a community center?			
Facilities: Is there an area where you can work on your car if you want to? Are there bike lockers? Does this area offer recycling or composting services?			
Pets: Are pets allowed? Are additional fees required?			
Other: List other characteristics and amenities you'd like for your comfort and lifestyle:			
Other:			
Other:			
Other:			
Other:			
COMFORT AND LIFESTYLE TOTAL SCORE			

HOME UNIT: WHAT IS THE SIZE, SHAPE, CONDITION, AND FEATURE SET INSIDE THE HOME?			
TOPIC	WEIGHT	RATING	SCORE
Size: Is the place the right size? Will your furniture fit? Check available storage: closets, attic space, a shed, or extra garage space. Are the common areas large enough if you want to entertain? Are there enough bathrooms?			
Floor plan: How do you like the layout? If you'll be sharing with a roommate, are the bedrooms separate enough from common areas?			
Condition: Is the building in good shape? Do doors and windows fit snugly into their frames? Are there signs of mortar work or cracks in the walls? Are there any water spots on the ceiling or issues with the plumbing or electrical system? If you're buying a resale home, look for a paper trail of receipts, repairs, upgrades, and services over the years. Is the rental maintained well? Does the landlord take good care of things? Will your maintenance requests be addressed promptly?			
Kitchen: Check the condition of appliances. If you prefer a gas or electric stove, is it the type you want? Is there a dishwasher? Are the cabinets and counters at a comfortable height and are there enough of them? Are there enough electrical outlets for countertop appliances and are they well placed? If you cook a lot, does the layout work for you?			
Bathroom: Is there enough counter space? Is there a bathtub? Check the working condition of faucets, shower heads, flushing mechanisms, drains, and ventilation fans. Does anything need to be replaced?			
Laundry: Is a washer/dryer furnished in this unit? If there's a shared laundry room, ask to see it—is it clean and are the machines working?			
Other: List other characteristics and qualities you'd like to have:			
Other:			
Other:			
Other:			
Other:			
HOME UNIT TOTAL SCORE			

SYSTEMS: HOW ARE THE SYSTEMS THAT MAKE UP THE HOME?			
TOPIC	WEIGHT	RATING	SCORE
Electrical: Can you run a hair dryer without tripping the circuit breaker? Are there enough electrical outlets? Are the outlets grounded?			
Plumbing: Are there any signs of leaks? Is there strong water pressure? Does the water get hot quickly? Are the sinks and showers what you want? Is there a septic tank and leach field or is the home connected to a municipal sewage system?			
HVAC systems: Does this home have electric, natural gas, or oil heating? What kind of air conditioner, if any, does it have? Do systems seem efficient, safe, and easy to maintain? Are the vents or the heating elements located in a good position to keep you comfortable and not be in the way?			
Lighting: Are rooms well lit? Do any fixtures need replacing?			
Floors: Is there hardwood or carpet flooring? Will the carpet need to be replaced? Is any tile in good condition?			
Modern amenities: Does the unit have a fireplace, energy-efficient windows, or other features not already mentioned?			
Other: List other important criteria for the systems you want:			
Other:			
Other:			
Other:			
Other:			
SYSTEMS TOTAL SCORE			

WORKSHEET: TO DO BEFORE YOU LEAVE

Make your own checklist of things that you want to do before you leave.

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

WORKSHEET: GOALS AND HABITS

Write down goals you'd like to set or habits you'd like to establish in your new home.

Goal/Habit 1: _____

Goal/Habit 2: _____

Goal/Habit 3: _____

Goal/Habit 4: _____

Goal/Habit 5: _____

Goal/Habit 6: _____

Goal/Habit 7: _____

Goal/Habit 8: _____

Goal/Habit 9: _____

Goal/Habit 10: _____

WORKSHEET: FEELINGS ABOUT NEW HOME

Use this worksheet to understand your feelings about your new home. Fill out every three months.

Date: _____

What do you like most?

What do you like least?

What do you miss?

What do you hope to do in the next three months?

WORKSHEET: CHANGES AFTER MOVING

This worksheet can help you identify ways that you've changed, explore what has influenced you, and understand your feelings.

HOW HAVE YOU AND YOUR LIFE CHANGED?	WHAT HAS CAUSED THIS CHANGE?	HOW DO YOU FEEL ABOUT THIS CHANGE?