



12-STEP ROADMAP TO YOUR NEXT DESTINATION



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Our Exclusive 12-step Roadmap Simplifies Your Next Move

Did you know that 53% of Bay Area residents are considering a move out of the Bay Area in the next few years? Perhaps you have considered doing the same. Whether you are relocating for retirement, a new job opportunity, or just a change of pace, planning your move out of the Bay Area can seem like a daunting and overwhelming process. But it doesn't have to be.

We've created our exclusive **12-step Roadmap** to help break down the steps of your next move. To make it simpler. And more manageable. We also make your move a reality as we guide you through every step of the process.

www.LeavingTheBayArea.com is your partner for a successful and enjoyable relocation experience!

Buying. Selling. Relocating. Simplified.

Subject Line: 12-step Roadmap To Your Next Destination



1



DISCOVERY CONSULTATION

Identify goals/objectives with Leaving The Bay Area's Concierge team

2



RESEARCH DESTINATION LOCATION

LeavingTheBayArea.com and other online resources

3



DETERMINE EQUITY POSITION

Calculate what you would profit from your home sale



CONSULT WITH CPA/FINANCIAL PLANNER

See how moving to your destination location will affect your finances

4




DESTINATION CONSULTATION

Phone consultation with our team in your destination location to discuss area, home, and price requirements


6

TAKE EXPLORATORY TRIP

Take guided area tour with our team in your destination location 

5

PREP HOME FOR SALE

Pre-inspections, repairs, cleaning, staging, photos, etc. Home in ready-to-list condition 

7




GET APPROVED

Get pre-approved for your next home purchase


8

TAKE BUYING TRIP

Meet with our team in destination location to go home shopping 


9

LIST HOME FOR SALE

Your home listed for sale within 2 days of offer acceptance 

12

MOVE-IN

Welcome to your new home! 



SCHEDULE LOGISTICS

Moving company, utilities transfers, etc

11



Step 1: Discovery Consultation

This step is about all you. Learning about what is important to you in your move. What are your goals and your objectives with your next move? What is your timeframe? What is important to you in your next location? Are you looking at retirement options, or are having the best schools for your kids important to you? If you are looking for a new job, what areas are conducive to hiring within your industry? How about climate, or taxes? Having this no-cost consultation helps us to better understand what you are looking to accomplish, and can also help you to clarify your own goals. Have a 30 min call with our Client Concierge team to open up your world of possibilities!

Contact us for your free Discovery Consultation:
<https://www.leavingthebayarea.com/contact-us>
or email us at info@leavingthebayarea.com



Step 2: Research Your Destination

Once you have identified an area or areas you are interested in, it's time to do some research. Compare cost of living, taxes, housing prices, healthcare providers, retirement destinations, education, transportation, climate and whatever else is important to you.

Visit <https://www.leavingthebayarea.com/destination-cities/> to compare cost of living in San Francisco with dozens of other cities across the US. There are also many other great online resources. This step is researching higher level data; in a subsequent step you will drill down further with our team members.



Step 3: Determine Your Equity Position

At this point, planning for your next home purchase is key. Now that you have an idea of what the average cost per home is in the destination city you are interested in, it's time to find out how much money you would likely walk away with from your home sale. The best way to do this is to consult with one of our local real estate specialists to see what your home will likely sell for. Having this number, we can calculate your closing costs and show you the amount you would make from your home sale. Using this number you can begin to plan how much down payment you want to put on your new home, and how much you want to put in savings, pay off debt, etc. We can also calculate some affordability scenarios, meaning if you intend to buy a home for \$450,000 and are putting \$200,000 down, we calculate what your mortgage payment, taxes and insurance would be on the new home. You don't need to necessarily get a full loan approval at this point, just run preliminary numbers to make sure the monthly payment is what you are comfortable with.

To schedule your no-obligation value assessment with our local real estate expert:

<https://www.leavingthebayarea.com/contact-us/>
or email us at info@leavingthebayarea.com



Step 4: Destination Consultation

Now that you have narrowed down your destination city, it's time to have a phone (or video) conversation with our team in that city. This is where we will drill down and find out what is important to you. If you are moving for your retirement, our focus will be on areas conducive to retirees, areas with close proximity to healthcare services, and retirement activities. Looking for an active adult community? We'll provide information and some great options within your budget.

Are you moving for a new job? We'll identify areas near major job hubs and map out transportation options. Have kids? We'll identify communities with the top school districts. Interested in new construction? We'll talk about who the top builders and new home communities are in the city.

This conversation is all about you and identifying the best home community options for you.

Contact us for your free Destination Consultation:
<https://www.leavingthebayarea.com/contact-us>
or email us at info@leavingthebayarea.com



Step 5: Consulting with CPA/ Financial Planner

Now that you have identified a city you are interested in moving to, and have talked with our local team in that city, it's time to start talking finances. Every city and state has different tax laws. For example, many states don't have a state income tax. Other states have lower income tax rates than CA. Some states tax retirement income, some don't. Other variances include healthcare costs, property tax rates, sales tax, insurance, etc. How will these rates impact your overall cost of living and finances? These are conversations you should now have with your CPA/Financial Planner.

If you are a business owner and are thinking of moving your business, or starting a new business in a different state, your CPA/Financial Planner will help you to understand the changes you can expect.

Don't have a CPA/Financial Planner? We have professionals we can refer to you that will help you. Their fees are based on their hourly billing rate.

<https://www.leavingthebayarea.com/contact-us/>
or email us at info@leavingthebayarea.com



Step 6: Take an Exploratory Trip

This is where it gets fun! You have already spoken with our team in your destination city and you have analyzed your finances. It's time to take a trip! Book a trip to meet with our team members and get a personal, guided tour of the area. Based on our team's previous conversation with you, they will design a custom tour of areas that will fit your needs and wants. Spend time viewing homes and communities, areas of interest, and anything that is specific to your needs. This can usually be done in 1 day. Our team will help you book your trip and will make hotel and transportation recommendations. In many cases they can pick you up from the airport and drop you off at your hotel. You may not even require a car rental unless you want to stay longer and do some sightseeing on your own!

You can schedule your city tour with us at
<https://www.leavingthebayarea.com/area-tours>.



Step 7: Getting Approved

Now that you have visited your destination city and have looked at homes, it's time to get approved for a home loan. There is no cost in doing this, and it doesn't bind you to making a purchase within any period of time, but it does prepare you to make an offer when the right home comes up. We suggest using lenders who are local in the city you are purchasing in, as they understand the local lending laws and requirements. We can recommend lenders to you that are very competitive in rates and programs, making it a very simple loan application process.

Need a Lender recommendation?

<https://www.leavingthebayarea.com/contact-us/>

or email us at info@leavingthebayarea.com



Step 8: Prepare Home For Sale

Now that you have looked at some homes in the city you are looking to move to, and have been pre-approved for a loan, it's time to get your home ready for sale. This includes decluttering, cleaning, painting, repairing, pre-inspections, staging, professional photographs and anything that needs to be completed to get your home in top condition and ready to list on the market. Our local real estate experts will help you through this process to make sure you are maximizing the value of your home. We will also provide you with the marketing strategy that will ensure your home sells for the most money in the shortest amount of time. The goal is to have your ready to be put on the market within short notice.

Need expert advice from our local real estate expert?

<https://www.leavingthebayarea.com/contact-us/>

or email us at info@leavingthebayarea.com



Step 9: Take a Buying Trip

Now that our team knows exactly what you are looking for in your next home purchase, and your current home is prepped for sale, it's time to take a buying trip! Our team will have identified homes that will be a great fit for you and will have those homes scheduled for your buying tour. When you find that perfect home, we will write the offer and get you into contract! Not finding the perfect home on this trip? No problem, we will resume the search!

To schedule your home buying trip, visit
<https://www.leavingthebayarea.com/area-tours/>



Step 10: List Home For Sale

Now that you are in contract on your new home, it's time to get your home listed on the market ASAP. In a previous step we took care of everything needed to get your home on the market, including staging and photos. Our local real estate team will have your home on the market within 1-2 days of you getting into contract on your new home.



Step II: Schedule Logistics

Our team has listed your home for sale, and you have just accepted a great offer! Now it's time to schedule the details of making your move, which we can do for you at no cost! This list of services includes electricity, phone, insurance, tv/cable, home security, internet, gas, moving/storage, and mail forwarding. Again, we can take care of this all for you, at no cost! Visit <https://www.leavingthebayarea.com/get-connected/> to get started!

Other items to consider at this point, registering your vehicles, applying for a driver's license, school registration, etc.



Step 12: Move In

Congratulations! You have moved in to your new home! At this point you may need recommendations for service providers such as house cleaning, contractors/handyman for new projects, landscaping/gardening, pool service, etc. Ask us! We have the right contacts to get you up and running quickly in your new home.