

Relocation Plan

Worksheet

Staten Island → Florida • Texas • Pennsylvania
Salmon Real Estate • Serving Staten Island for 50+ years

1. Quick Start & Goals

How to use this worksheet (2 minutes):

1. Pick the **state path** you're most curious about.
2. Fill the **Monthly Carry** boxes (payments, not just prices).
3. Choose a **Timing Option** so you **move once** (not "between homes").
4. When done, follow the **Next Step** box.

A. Your Situation

Preferred window to move (month/season/year): _____

B. Your Goals (pick up to 3)

- | | | |
|--|--|---|
| <input type="checkbox"/> Lower monthly cost | <input type="checkbox"/> Warmer climate | <input type="checkbox"/> More space/lot |
| <input type="checkbox"/> Closer to family | <input type="checkbox"/> Lower maintenance | <input type="checkbox"/> Newer home |
| <input type="checkbox"/> Near hospital/airport | <input type="checkbox"/> Walkability | <input type="checkbox"/> Other: _____ |

C. Your State Path:

- ☐ Florida
- ☐ Texas
- ☐ Pennsylvania
- ☐ Undecided

D. Your Monthly Target (all-in payment)

\$ _____ per month

E. Need to sell before buying? ☐ Yes ☐ No ☐ Not sure

2. Monthly Carry (Work the Real Number)

Price ≠ cost. Your real number is **P&I + property taxes + homeowners insurance (+ HOA/condo, if any).**

Write rough estimates now. We'll help you verify per area/property later.

Area / Community	Price Target	Down Pmt	Est. P&I	Est. Taxes	Est. Insur	HOA / Condo	Est. Total
FL	\$_____	\$_____	\$_____	\$_____	\$_____	\$_____	\$_____
TX	\$_____	\$_____	\$_____	\$_____	\$_____	\$_____	\$_____
PA	\$_____	\$_____	\$_____	\$_____	\$_____	\$_____	\$_____

Need help with this? We got you. Reach out for free guidance.

Notes:

Helpful reminders (fill later if unsure):

- Property **taxes** vary by **county/municipality**.
- **Insurance** varies by **roof age, distance to coast, and carrier availability**.
- New communities may have **HOA/CDD** fees.
- For a primary home in some states, **homestead** may apply (confirm locally).

3. Move Once (No “Between Homes”)

Pick one main option and pencil the dates. We'll tighten during your consult.

A. Choose Your Timing Option

- ☐ **Rentback** (sell now; stay briefly after closing)
Good when: you want breathing room while FL/TX/PA closing finalizes.
- ☐ **Extended Closing** (align sell + buy closings same week)
Good when: both sides can coordinate dates.

B. Pencil Your Dates

- Target **list date** (NY): ____ / ____ / ____
- Target **close (sell, NY)**: ____ / ____ / ____
- Target **close (buy, FL/TX/PA)**: ____ / ____ / ____

C. Tiny Backup (always pencil this)

- ☐ Short **temp stay** (hotel/short-term) held with 24-hr cancellation
- ☐ **Storage unit** on hold (24-hr cancellation)
- ☐ Movers: quotes ×3 and preferred pick _____

D. To-Do Prep (NY side)

- ☐ Walkthrough + light tune-ups (paint/landscape/lighting)
 - ☐ Photos scheduled
 - ☐ Declutter plan
 - ☐ Key documents organized
-

4. Destination Fit & Next Step

A. What matters most there? (check 3–5)

- ☐ Single-story ☐ Low HOA ☐ 55+ okay ☐ Newer build
☐ Walkability ☐ Golf/beach/amenities ☐ Near hospital
☐ Airport access ☐ Larger lot ☐ Townhome/condo okay
☐ Schools/grandkids proximity ☐ Other: _____

B. Deal-Breakers (must avoid):

C. Three Places to Explore (name styles, not listings)

1. _____

Why it fits / what to watch: _____

2) _____

Why it fits / what to watch: _____

3) _____

Why it fits / what to watch: _____

D. Your Next Step (book when this page is done)

- We'll review your **Monthly Carry**, tighten **shortlists**, and map the **move-once** timeline to your dates.

- **How to schedule:** Call/Text: _____ • Office:

(Fill these in before you print.)