



**G.A. Retirees Association, Inc.**

# SENIOR REAL ESTATE OPTIONS

Ron Greenwald  
REALTOR®, Broker Associate, MBA, SRES®  
GREENWALD REALTY TEAM

# Greenwald Realty Team

## *Who We Are & Why We Do What We Do*

We are Real Estate Professionals dedicated to the service of Seniors within our community.

We're here to help make the rest of your life, the best of your life!



Real. Estate. Answers.



SmartSize <sup>TM</sup>

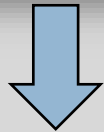
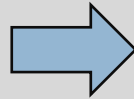
## SENIOR STAY OR GO <sup>TM</sup> PROGRAM

Our program,  
*Senior Stay or Go*,  
was developed to  
assist families  
through difficult  
times and choices  
of transition with  
their loved ones.

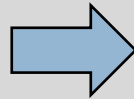
ENJOY LIFE.  
IT HAS AN EXPIRATION DATE.



# TODAY'S PRESENTATION WILL FOCUS ON



RIGHTSIZING



# REAL ESTATE OPTIONS / THINGS TO CONSIDER



**AGING IN PLACE**

*RIGHTSIZING VS. DOWNSIZING*



**SENIOR COMMUNITY**



**HOME SHARE**

# OUTLINE

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Aging in Place

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Care

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Financial & Legal - The Money\$

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Housing Options

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The Stuff

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The Move

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Selling a Home

# AGING IN PLACE

## Most Common Accidents Experienced By Seniors Who Live Independently

Falls (which may  
result in brain  
injuries, or hip,  
vertebrae or pelvis  
fractures)

House Fires

Bedsore

Infections

Burns

Lacerations

Sprains





# WARNING SIGNS

- Loose Area Rugs
- Lack of Accessible Seating in Bathroom or Kitchen
- Lack of Balance Bars in Bathroom
- Unsafe Thresholds including Cracks, Rocks and Roots
- Poisonous Materials



CARE [www.aginglifecare.org](http://www.aginglifecare.org)

# FINANCIAL & LEGAL - The Money \$



## **CAPITAL GAINS**

SELLING  
PRIMARY  
RESIDENCE



## **CASH FLOW**

LIFE  
EXPECTANCY



## **PROP 19**

TRANSFER TAX  
BASIS



## **STEP UP IN BASIS**

PROPER TITLING



## **FINANCIAL RESOURCES**

L-T-C

# HOUSING OPTIONS

## TAKE A CRUISE



## HOME SHARE

What we love most about our  
**H**OME  
is who we share it with

## MOVE IN WITH RELATIVES





# HOUSING OPTIONS

Age Restricted Only

Independent Living Community

Assisted Living

Memory Care

CCRC-Continued Care

Retirement Community

Board and Care

**EXAMPLES: See following pages**

AGE  
RESTRICTED  
ONLY

55+  
Where You  
Own Your  
Own Home

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Ocean Hills Country Club - Oceanside, CA

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Auberge at Del Sur - San Diego North

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Bernardo Oaks - Rancho Bernardo

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Seven Oaks - Rancho Benardo

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Pacific Regents - UTC (Hybrid)

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Rancho Carlsbad

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Oceana - Oceanside

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55+ Apartments - Various Locations

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Out of San Diego County: [www.55places.com](http://www.55places.com)

INDEPENDENT  
& ASSISTED  
LIVING  
COMMUNITIES

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Oakmont

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Merrill Gardens

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Belmont Village

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Silvergate

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Atria

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Westmont

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Wesley Palms, Front Porch

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Sunrise

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Seaside Village

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Casa de Manana, Front Porch

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Brookdale

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*\*Placement Professional - What is Best for You?*

ONLY MEMORY  
CARE

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Ivy Living

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Activ Care

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Monarch Cottages

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Silverado

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Summerfield

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Olivenhain Guest Home

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Stellar Care

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*\*Placement Professional is a MUST*



CCRC

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The Vi

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White Sands

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La Costa Glen

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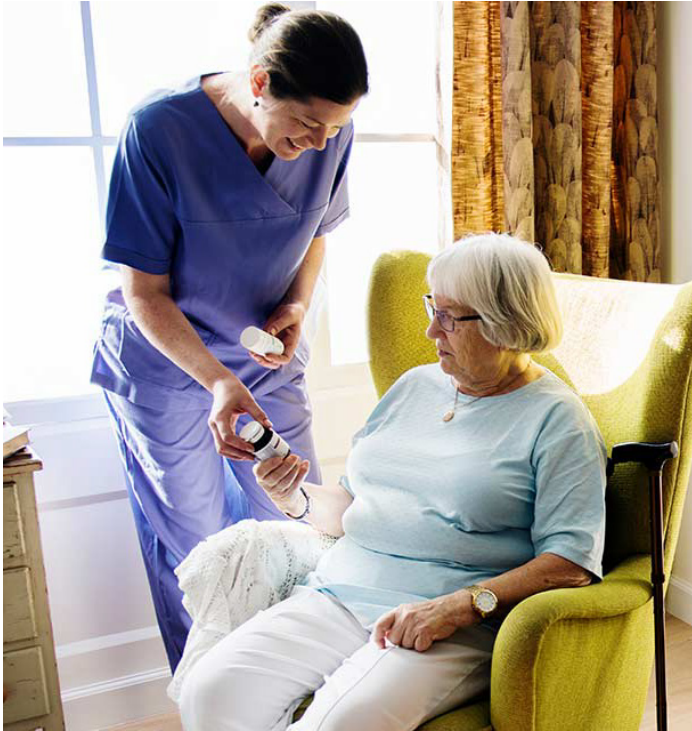
Scripps Glen

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Casa de las Campanas

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Fredericka Manor



# BOARD & CARE

# What to do with the “STUFF?”



- Emotional Attachment
- Nobody Wants It
- Injuries
- Paralysis by Analysis
- 10 Round Battle
- Realistic Expectations
- “The Sticky Note Party”

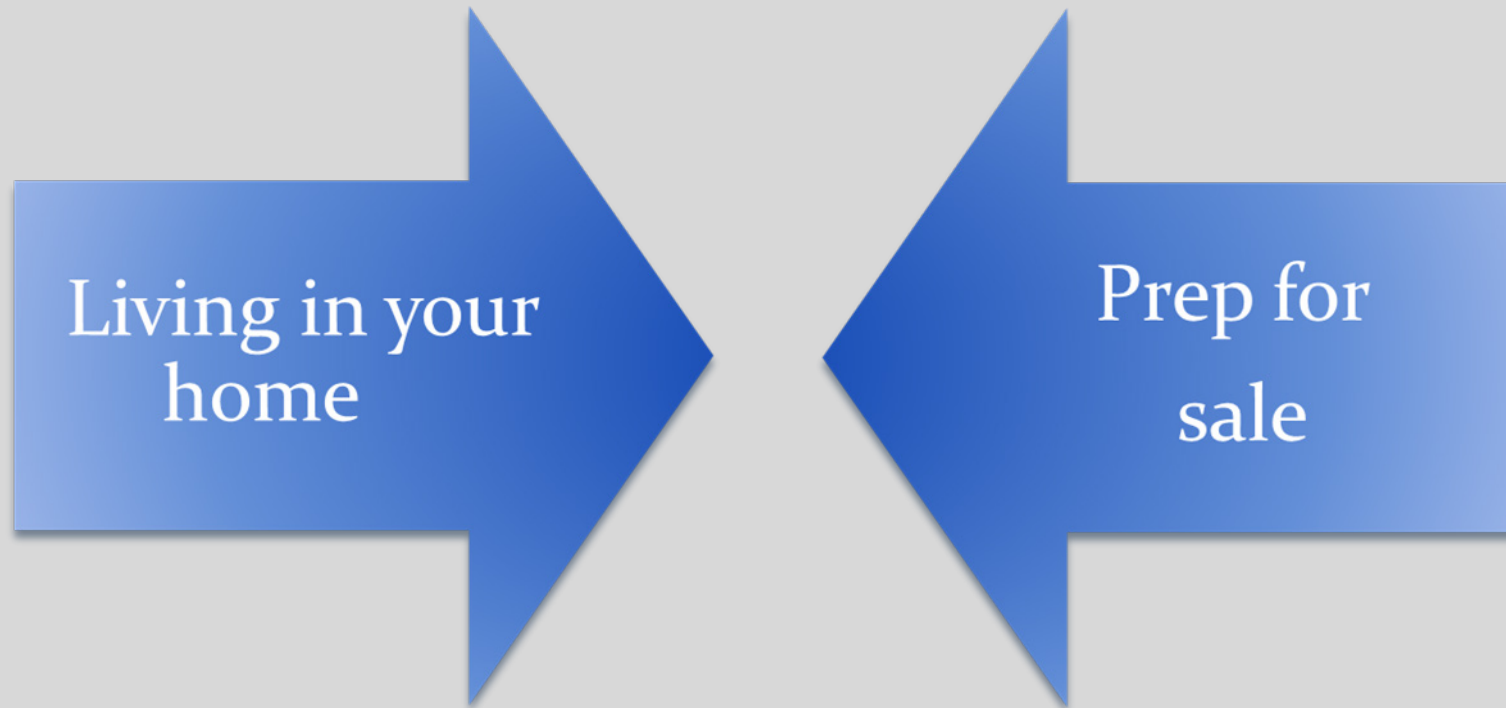


# THE MOVE

## There is a Solution

- Move Manager
- Estate Sale
- Charitable Giving
- Other

# SELLING YOUR HOME



**REACHING 100% OF THE BUYERS ALL THE TIME!**

# Knowledge + Facts = Leverage

Home Inspection



Budget

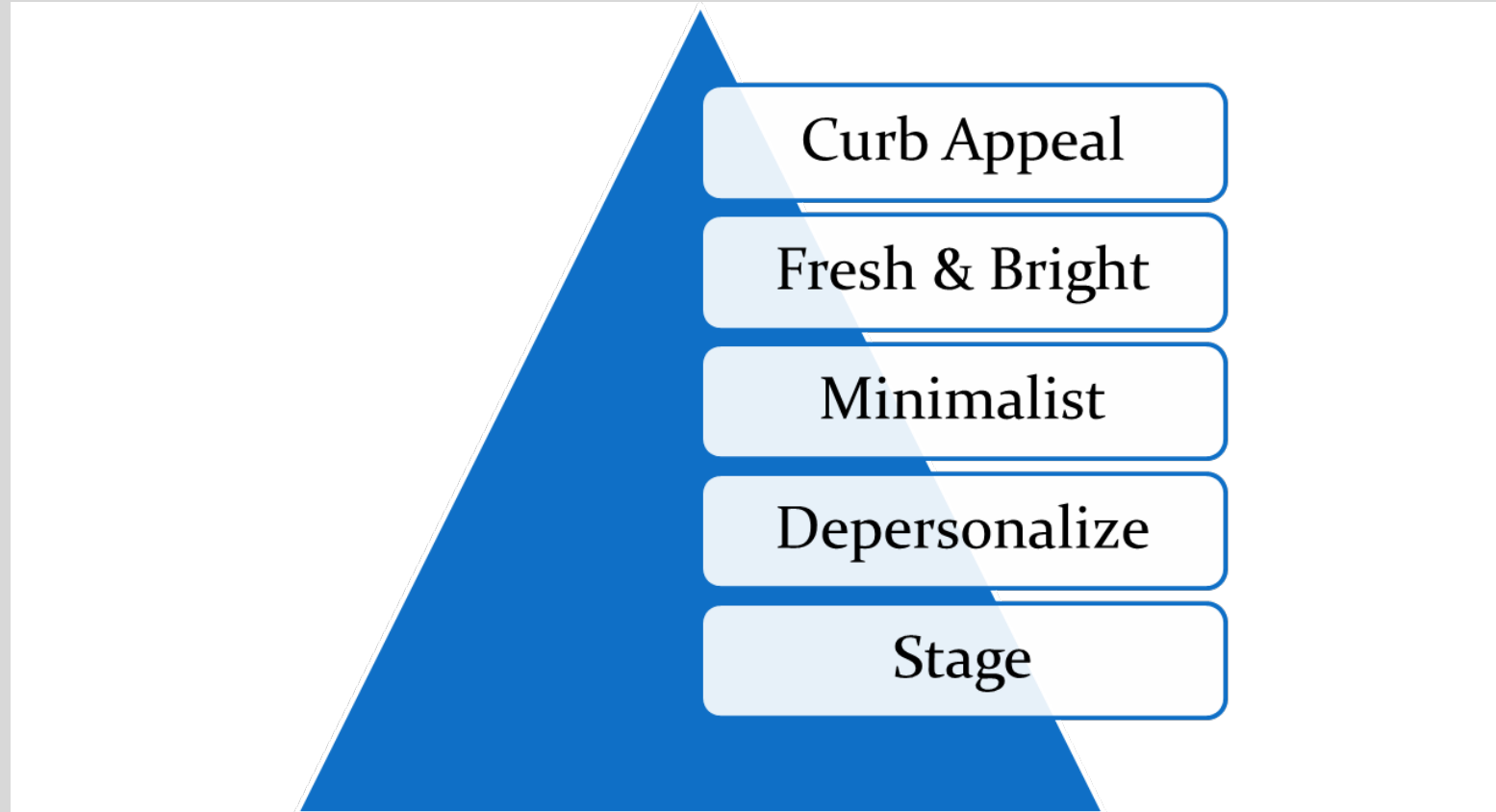


Prioritize



Repairs/Fixes/Upgrades

# MAXIMUM PRICE = NO EMOTIONS





# QUESTIONS



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**GREENWALD**  
REALTY TEAM

PREMIERE ESTATES  
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**BRAUN**  
INTERNATIONAL REAL ESTATE  
SINCE 1908