

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Follow-up: Downsizing Consultation for [Property Address]

Dear [Client Name],

Thank you for taking the time to meet with me on [Date] to discuss your plans for downsizing. I enjoyed learning more about your goals and touring your home.

As we discussed, moving to a smaller space is a significant transition, and my priority is to make this process as smooth and stress-free as possible for you. Based on our conversation, here is a summary of the next steps we identified:

- [Action Item 1: e.g., Sorting and decluttering schedule]
- [Action Item 2: e.g., Market valuation of your current property]
- [Action Item 3: e.g., Researching smaller home options or senior living communities]

I have attached the [Resource Name, e.g., Downsizing Checklist/Market Report] we spoke about for your review.

I will follow up with you on [Date/Time] to see if you have any further questions. In the meantime, please feel free to reach out to me via phone at [Your Phone Number] or email at [Your Email Address].

I look forward to helping you navigate this next chapter.

Best regards,

[Your Name]

[Your Title]

[Your Company Name]