

[Your Name]
[Your Company]
[Your Phone Number]
[Your Email Address]

[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Subject: Next Steps: Right-Sizing Your Real Estate Portfolio

Dear [Client Name],

Thank you for taking the time to speak with me on [Date of Meeting/Call] regarding the strategic right-sizing of your real estate portfolio. It was a pleasure learning more about your current goals and the specific property at [Property Address].

Based on our discussion, here is a summary of the next steps we identified to align your assets with your current lifestyle and financial objectives:

- **Market Analysis:** I will provide a Comprehensive Market Analysis (CMA) for your current property to determine its peak market value.
- **Target Criteria:** We will refine the requirements for your next property, focusing on [Reduced Maintenance/Accessibility/Location].
- **Financial Coordination:** We will review the estimated net proceeds from your sale to establish a comfortable budget for your transition.
- **Property Preparation:** I will send a list of recommended minor updates to maximize your home's appeal to potential buyers.

I am currently finalizing the market data we discussed and will have that report ready for you by [Date]. In the meantime, please feel free to reach out if you have any questions or if your timeline has shifted.

I look forward to helping you navigate this transition smoothly.

Best regards,

[Your Signature]

[Your Printed Name]