NO REGRETS MOVE™

Professional Discussion Guide

Follow-up prompts, decision areas, scope reminders and referral considerations

This guide supports a professional-led relocation conversation. Work through the questionnaire in your normal manner and use these prompts when an answer is incomplete, inconsistent or dependent on something that has not yet happened.

How to run the conversation

- Establish what the client has already decided before discussing property requirements.
- Record answers as confirmed facts, working assumptions or unresolved questions.
- Ask what would need to be true for the current plan to work.
- Identify the sequence: what must happen first, and what depends on it.
- Close by naming who is responsible for each unresolved item and when it is needed.

Follow-up prompts by decision area

The proposed move

- What is driving the target date, and how firm is it?
- Which parts of the plan has the household already committed to in writing?
- What would the household consider a successful outcome twelve months after the move?

Timing and housing dependencies

- What happens to the plan if the current home takes longer to sell than expected?
- Is there a gap between the lease end or closing date and the required arrival date?
- Has temporary housing been priced, or is it an assumption?
- Which contingency, if it failed, would change the housing approach entirely?

Employment, income and financial transition

- Which income is contractually confirmed at the destination, and which is expected?
- Has relocation assistance been confirmed in writing, including what it excludes?
- Has the household compared purchasing power rather than salary alone?
- Which figures are estimates that a lender, tax professional or financial planner should validate?

Household continuity and functional requirements

- Which arrangements the client has raised require transition planning before a housing commitment?
- Which of those require verification by someone other than the real estate professional?
- What objective access requirements has the client stated (travel time, distance, housing features)?

Destination familiarity

- Has the client experienced the destination under ordinary weekday conditions?
- Which assumptions about commute, services or climate come from research rather than experience?
- Would a further visit or an initial rental reduce the cost of being wrong?

Decision readiness

- What is the earliest point at which the client becomes difficult to reverse?
- Which unresolved item is most likely to change the plan?

- Is anything being decided only because of time pressure?

Professional scope reminders

- Provide real estate services within your qualifications, licensure and brokerage policies.
- Do not provide legal, tax, financial, lending, insurance, medical or educational advice.
- Distinguish factual information from opinion, and say when something is unverified.
- Document what was discussed rather than characterizing the client or a community.
- Follow your brokerage's supervision, recordkeeping and advertising requirements.

Referral considerations

- Lender or mortgage professional: qualification, cash to close, reserves, payment scenarios.
- Financial planner or CFP® professional: cash flow, affordability, insurance, longer-term tradeoffs.
- CPA/PFS practitioner or qualified tax professional: state and local tax implications.
- Attorney: contracts, domicile, estate-planning and other legal questions.
- Employer or relocation representative: benefits, reimbursement rules and eligible services.
- Destination real estate professional: local market conditions and out-of-market representation.
- Other qualified specialists: education, healthcare, caregiving or insurance transitions.

Fair Housing and professional-use notice

No Regrets Move provides educational decision-support tools and does not recommend particular neighborhoods or properties. Professionals remain responsible for complying with federal, state and local Fair Housing requirements, applicable professional standards, brokerage policies and other legal obligations. Apply objective criteria consistently, preserve client choice, and do not use protected characteristics—or proxies for protected characteristics—to direct a client toward or away from any community or housing opportunity. Provide factual information from appropriate sources and avoid personal opinions, subjective neighborhood characterizations and unsupported conclusions. This resource is not legal advice or a substitute for professional training, broker supervision or advice from qualified counsel.

What this guide is not

- It is not a scoring model, a risk rating or a recommendation to move or not move.
- It is not a compliance program or a substitute for brokerage training and supervision.
- It is not required in order to use No Regrets Move.

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