

NO REGRETS MOVE™

Quick-Start Guide

How to use the toolkit professionally without requiring client self-completion

The toolkit is designed for professional-led use. The normal pattern is that you conduct the conversation and complete the questionnaire using information provided by, or reviewed with, the client. Giving the client a worksheet is optional.

In fifteen minutes

- 1 Print or open the Relocation Client Questionnaire before your consultation.
- 2 Work through Sections 1 and 2 first: the proposed move, and timing and housing dependencies.
- 3 Complete Sections 3 to 6 in whatever order the conversation takes.
- 4 Transfer anything unconfirmed to the Relocation Dependency Map.
- 5 Use the Next-Steps Worksheet to name who is responsible for each open item and when it is needed.
- 6 Record how the questionnaire was prepared using one of the two participation statements.

What each component is for

- Relocation Client Questionnaire — the structured, professional-led record of the conversation.
- Professional Discussion Guide — follow-up prompts, scope reminders and referral considerations.
- Relocation Dependency Map — separates confirmed facts, working assumptions and unresolved questions.
- Next-Steps Worksheet — verification owners, dates and referrals.
- Fair Housing and Practice Guardrails — objective-use and client-choice reminders.

Optional client completion

If a client prefers to provide initial information themselves, give them the questionnaire as a worksheet, then use your professional judgment and normal procedures to clarify anything that requires discussion or verification. Client completion is never required.

How this relates to No Regrets Move

This toolkit is free, optional and useful on its own. It contains no scoring, no risk band, no destination calculations and no Quick View or Blueprint output. A paid No Regrets Move professional assessment adds a structured workflow, objective financial and destination information, an NRMI score with banded interpretation, a risk-driver dashboard, recommended actions and the applicable report outputs.

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.

Version 1.0 — September 2026 | Source: <https://www.noregretsmove.com/resources/relocation-client-questionnaire> | Terms: <https://www.noregretsmove.com/legal>