

SENIOR DOWNSIZING *Checklist*

Downsizing can feel like a big project, especially when your home holds years of memories and routines.

This simple checklist is designed to help seniors and their families begin the process gently, with more clarity and less stress, one step at a time.

1. Clarify your goals

- Think about why you are considering a move.
- Decide what matters most in your next home (ease of living, location, lifestyle).

2. Start the conversation early

- Talk with family or trusted support people about your plans.
- Share your priorities and give everyone time to adjust.

3. Create a rough timeline

- Decide whether you are planning for this year, next year, or further ahead.
- Allow time for decluttering, paperwork, and preparing your home.

4. Sort belongings by category

- Start in less emotional spaces such as storage rooms or closets.
- Use simple piles: keep, donate, sell, gift, recycle, discard.

5. Identify meaningful items

- Set aside heirlooms, photo albums, and special keepsakes.
- Ask family members if there are items they would like to receive.

6. Gather important documents

- Collect legal, financial, medical, and housing-related paperwork in one place.
- Make sure trusted family members know where these documents are stored.



7. Review your finances

- Consider the costs of moving, services, and your next home.
- Talk with trusted professionals if you want help planning your budget.

8. Evaluate your current home

- Make note of any repairs or updates that may be helpful before selling.
- Focus on safety and overall presentation rather than major renovations.

9. Explore next housing options

- Consider condos, apartments, bungalows, retirement residences, or adult lifestyle communities.
- Think about stairs, parking, storage, healthcare access, and nearby supports.

10. Build the right support team

- Connect with professionals who understand senior transitions.
- This may include a real estate agent, mover, organizer, lawyer, or accountant.

11. Prepare emotionally for the move

- Acknowledge that mixed emotions are completely normal.
- Focus on the lifestyle and peace of mind you are moving toward.

12. Keep a simple moving folder

- Track key contacts, dates, receipts, and notes in one place.
- Staying organized helps the move feel calmer and more manageable.

This checklist is meant to make the first steps feel lighter. If you'd like to go deeper or talk through your options, I'm here and happy to help.



613-301-3213



MF@mflrealtor.com



www.mflrealtor.com

