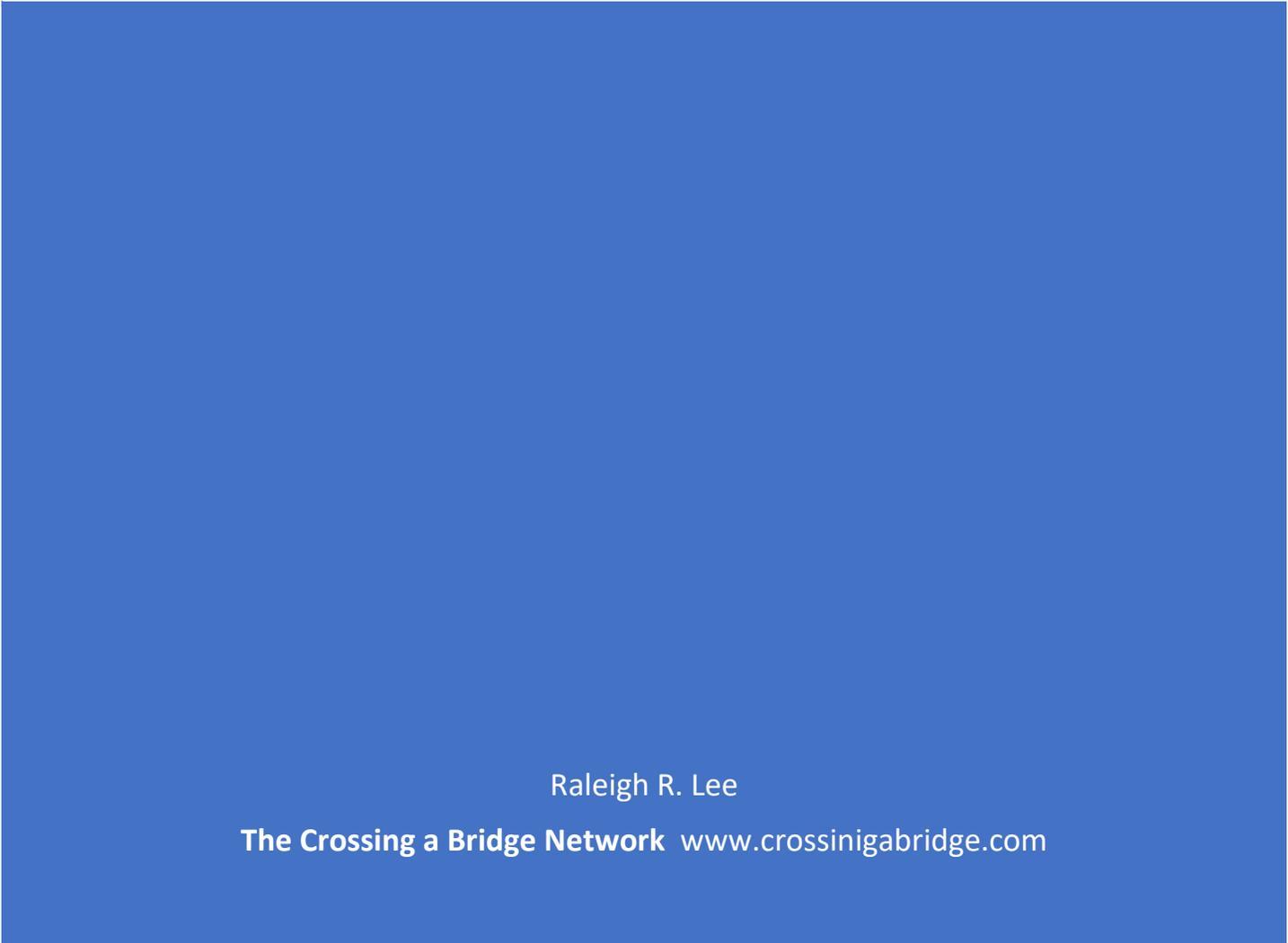




***The Seniors Real Estate Specialist
Downsizing Cheat Sheet Checklist***



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The Crossing a Bridge Network www.crossinabridge.com



For More Information

Talk to your senior living advisor or contact us at 678.787.1364.



Many people struggle with later-in-life living decisions. We have a process that helps them make the right choices so that they preserve their dignity and peace of mind.

Working with your Senior Living advisor, we help you with every step along the way - planning, downsizing, financing, maximizing tax benefits, avoiding legal issues, and selling your house. We have REALTORS in all 50 states and Canada who are Seniors Real Estate Specialists®.

Step 1	Get Your Paperwork Together	Notes
<p>Paperwork is a big burden for downsizing your home, but it is something many people overlook. The exact set of documents you'll need will vary based on your situation. So, we've put together just a few things to fill out and collect to get you started thinking about all the information you'll need for the big move.</p>	<p>Make copies of your driver's licenses and other state IDs.</p>	
	<p>Update your address with Medicare and Social Security, plus your voter registration.</p>	
	<p>Give your new address to the companies who hold your investment accounts and retirement accounts.</p>	
	<p>Talk with your utility providers to turn your service off at the old home and on at the newer home. Don't forget your phone, Internet and/or TV providers.</p>	
	<p>Copy all insurance policies and related documents. That may include your life insurance information and your auto policy as well as the car registration related to that policy.</p>	

Step 1	Get Your Paperwork Together	Notes
	Go to the post office to fill out a “Change of Address” form when you have your new location. You can also change your address online with the USPS.	
	Update book, magazine and newspaper subscription information. Gather these and contact your service providers to change the address.	
	Discuss what you’ll need from your retirement community and if they handle any of these items – such as setting up utilities – for you.	
	Speak with your doctors so you can refill your current prescriptions in advance of an address change.	

Step 1	Get Your Paperwork Together	Notes
	<p>Give your new address to your family, friends and people who help you manage your financial life. This may include accountants, lawyers, bankers or insurance agents.</p>	

Step 2	Sorting	Notes
<p>Start in your least used areas, and work on large items first. This allows you to:</p> <ul style="list-style-type: none">• see quick results - improves your motivation• use these areas as storerooms for sorting the main areas <p>Put each item into one of four categories: keep, sell, donate, or recycle/trash.</p> <ul style="list-style-type: none">• One-year rule: If you haven't used it in 1 year, it's out	Attic	

Step 2	Sorting	Notes
<ul style="list-style-type: none">• Exceptions: If you didn't use it last year but <i>know</i> you'll use it this year, consider keeping. <p>Pictures and Scrapbooks</p> <ul style="list-style-type: none">• Place most pictures/scrapbooks automatically in the keep pile, rather than digging into sorting through them.• Keep most photos initially. When you unpack, you'll have	Garage	

Step 2	Sorting	Notes
<p>plenty of time to review each of them individually, but doing so now will greatly slow down the process and may make it harder to finish.</p> <ul style="list-style-type: none">• If you are moving to a home or senior living community that serves meals, you should consider reducing the number of kitchen items and serving pieces that you keep.	Shed	

Step 2	Sorting	Notes
<ul style="list-style-type: none">Sort furniture into the same piles as the rest, but also rank pieces as you go. This will help you prioritize what to take in case the new home is too small to bring everything you like. <p>Don't jump around. Finish one room, closet or cabinet before going on to another area.</p>	Storage space	

Step 2	Sorting	Notes
<p>Make stickers for each category, and label everything as you go.</p> <p>Use a digital camera to shoot good photos of meaningful items, then get rid of them. The photos can be used to create digital or even physical scrapbooks, preserving the memory without having to continue storing the item.</p> <p>Once everything has been sorted, pack and store as much of the “keep” pile as possible.</p>	<p>Living Space</p>	

Step 3	Sell Stuff	Notes
<p>Decide how you want to sell your things.</p> <p>Make sure it's worth the money you will make, especially with a limited timeline.</p>	Garage sale	
	<u>eBay</u>	
	<u>Craigslist</u>	
	<u>Nextdoor</u>	
	<u>Etsy</u>	
	Consignment shop	

Step 4	Donate What You Can't Sell	Notes
<p>Used bookstores will often take donations of books. You could also seek out nonprofits in your area that connect donated books with classrooms, libraries, children in need, or incarcerated people. The American Library Association has listings of organizations that accept donations and suggestions for other places to give away books.</p> <p>As a last-ditch effort, before you recycle or trash stuff, put what's left out on your driveway or stoop and post a "curb alert" for free items on your local Craigslist.</p>	Homeless and domestic violence shelters	
	refugee assistance organizations	
	religious organizations	
	local service organizations	
	Goodwill	

Step 5	Recycle or Trash What You Can't Donate	Notes
<p>Most municipalities have rules about bulk trash pickup. Make sure to check your local ordinances.</p>	Bulk trash pickup	
<p>You may want to rent a dumpster if you have a large amount of trash. There are also trash removal services that will haul away large amounts of trash and bulk items for a fee.</p>	Dumpster	
<p>Most electronics and textiles can be recycled.</p>	Recycle	
<p>Be careful disposing of paints, chemicals, and other potentially toxic items.</p>	Toxic items	
<p>If you're working with a Seniors Real Estate Specialist®, they should be able to help you with this step.</p>	Seniors Real Estate Specialist®	

<p style="text-align: center;">Step 6</p> <p style="text-align: center;">(optional)</p>	<p style="text-align: center;">Get Professional Help</p>	<p style="text-align: center;">Notes</p>
<p>To get this done quickly, you might need some help.</p> <p>Your first best resource should be a Seniors Real Estate Specialist®, if you're selling the house you're moving out of. An SRES® agent comes with an entire team to help coordinate everything from garage sales to packing to recycling trucks.</p>	<p style="text-align: center;"><u>Seniors Real Estate Specialist®</u></p>	
<p>You might want to consider a Senior Move Manager. This is someone who specializes in helping people move from a large family home to a smaller residence or senior-specific housing.</p>	<p style="text-align: center;"><u>Senior Move Manager</u></p>	

Space Planning	
Task	Notes
Subtract the square footage of the future home from the current house. Add in new square footage like a den, deck, or sunroom.	
Measure furniture to be moved to ensure fit.	
Ask if the facility – senior community, assisted living, continuing care – can provide space planning assistance.	

Assess Future Needs

Task	Notes
<p>Is it family-sized?</p> <ul style="list-style-type: none">▪ Items, like large camping tents, probably won't be needed.	
<p>Will it fit?</p>	
<p>Compare size and square footage. A space planner can help.</p>	
<p>Is it house-oriented?</p>	
<p>If moving to a condo or townhouse, get rid of lawn mowers, snow blowers, and large gardening tools.</p>	

Managing Time	
Task	Notes
Allow Time: Most downsizing projects take 2-3 months.	
Start early: Begin the process before the house is listed. If it sells quickly, there will be less time for finishing the tasks.	
Schedule: Set a plan by room, week, month, or other milestones.	
Take Time: Spreading out the process makes it less emotionally wrenching.	