

# Senior Mover & Downsizing Services Checklist

From <https://www.senioradvisor.com/checklist/senior-movers>

Senior movers, senior downsizing services, professional organizers, and family or friends can help with downsizing into a smaller living space or moving into an assisted living facility. Downsizing is a great option for seniors who are no longer able to care for their homes but still want to maintain an active living lifestyle. In some cases, downsizing is a forced decision due to a sudden illness, injury, or even death of a partner. In any event, the key to effective downsizing is to be objective and transparent about the new realities.

Downsizing can be a stressful time for your loved one and your family. Be mindful of your loved one's feelings and work with a positive outlook that the new transition will be better than their current situation.

Regardless of whether you choose to downsize or move on your own or hire an outside service, this guide will help you navigate the process.

## Option 1. Downsizing or moving on your own

- Create an overall game plan. Why is your loved one moving? This will determine how much time you have to prepare and how much you need to downsize.
- Be specific in setting your goals and provide timelines.
- Decide on the new floor plan as this will determine how much you will need to shed. A good rule of thumb is to reduce the items by two-thirds before moving out. Create a space plan for the furniture and ensure you have ample room to move around.
- Create a rhythm and avoid pitfalls. Work for two to three hours at a time every day. Focus on one area at a time. Don't jump around from room to room. It's easier to start on larger items to get traction and motivation. Sort through pictures and albums last.
- Whittle down current belongings into these sorted groups: sell in estate sale, give to charity, keep for the new home, give to family members, put in storage, and trash or recycle.
- If your loved one insists on giving you items you absolutely do not want, go ahead and accept the items thanking them for the gift. You may deal with the items at a less stressful time.
- Keep your loved one engaged in the downsizing process by giving them options to choose from: "Do you want to keep Aunt Thelma's dresser set or the 6-piece modern dresser set instead?" By giving them options, you can help them determine which items mean more to them than the others.
- If your loved one is having difficulty in letting items go, consider renting a storage facility where the items can be boxed and stored temporarily.
- If you still have too much stuff, consider taking a picture of the items and making a memory book for your loved one to enjoy and share with others in the new community.
- Ship or give the selected items to family members. Host your garage and estate sales. Give remaining items to charity. Schedule for junk removal.
- Pack and label boxes according to where your loved one would like them placed in the new home.
- Make a second visit to the new place of residence to get a feel of the layout. Reevaluate which items may not be able to fit into the new home.
- Ensure utilities and electricity are notified both at your current residence and at your new residence.

- Have your mailing address updated with your new forwarding information. Ensure that medical providers are notified of the change in address.
- Pack a “first day” box that your loved one can open on the “first day” of being at the new home. Items to include: pillow, blankets, flashlight, towel, toiletries, clothes, and extra medication.
- Gather important items such as checkbooks, money, jewelry, valuables, medical documents, and passports into a secure place to keep with you during the move.
- On moving day have everything that your loved one will need on the following day ready and in place at the new home (ie, bed set up with the linens, familiar food items in the fridge, toiletries set up in the bathroom, pictures or items that they love set up).
- On moving day, walk through a final time at the current home to ensure all items have been packed up and loaded. Upon completion of the move, ensure all furniture is intact and all boxes are accounted for.
- Provide support and reassurance during this transition time. Call often to check up on your loved one. Plan lunches and outings regularly. Encourage other family members and friends to get involved as well.

### **Option 2. Hiring a downsizing service**

Professional downsizing services can have the entire new home unpacked, set-up, fully furnished, and decorated before your loved one arrives. If the thought of downsizing is too much, there are plenty of quality senior downsizing services that can help your loved one in their move. The National Association of Senior Movers<sup>®</sup> provides a list of excellent resources, and local assisted living communities also provide information on local downsizing services. If you elect to use a senior downsizing service, ask the following questions:

- How long have you been in business?
- Who are you certified through?
- What senior downsizing services do you offer?
- How long will it take to downsize the home? Will you provide setup assistance as well?
- Do you charge by the hour or by the project?
- Have a written contract in place.

### **Option 3. Hiring a senior mover**

If you cannot be closely involved in the process, considering hiring a Senior Move Manager<sup>®</sup> as they can provide quality support tailored your loved one’s moving needs. When deciding between senior moving companies make sure to ask the following:

- How long has the senior mover provider been in business?
- What types of certifications or specializations do they have? Some senior movers are partnered with local assisted living communities and may have first-hand knowledge about the facility.
- Are they a registered member of the National Association of Senior Move Managers (NASMM)? Though not required, this extra certification shows you, the client, that the services they provide adhere to specific rules, ethics, and guidelines regarding senior moves.
- Are they fully insured? What is covered in the event of loss, theft, or damage while the items are being moved?
- How are services charged? By hour or by project? Will a written contract be provided?
- Are they able to provide references?