

LOVING TRANSITIONS

Where do you start?

Key things to do when downsizing

- Make a list and complete a time table/check list of events and when they should occur.
- Make a list of who wants specific items in the house for example, "Grandma's chandelier goes to one of the grand daughters" that way these important sentimental items are not forgotten about or missed.
- Get estimates from moving companies. Some fees can be negotiated. Make sure you know what is included in their services... packing, unpacking do they give you packing materials etc. If so, what?
- Choose a move date. It may change, but will give everyone a date to work towards.
- Get a floorplan of your new home. Start to place furniture and decide what will fit and what will not. We suggest getting sticky notes with different colors. For example... Pink for "goes with me", Blue is "to be sold," Green "to be donated", and yellow "goes to a family member." Get a system and start tagging larger pieces. This will make it easier when moving time comes around.
- Talk with an estate sale company to help you decide what items that you may want to leave and/or sell. They can let you know if you have enough items left to have an estate sale.
- Find local charities to whom you would like to donate any additional items that cannot be sold at an estate sale or a garage sale. There are many charities that will come pick items up so you don't have to worry about delivering them.
- Start working on changing your mailing address. Credit cards, bank accounts, Drivers license, utility accounts, investment accounts, Medicare and Social security etc. You will want to make sure you don't miss any important items in the mail. It is not always enough to simply forward your mail, especially with important items.
- Locate all important documents and put in a special box prior to packing so nothing is lost. Birth certificates, social security cards, deeds, wills, power of attorney, insurance policies, titles, death certificates, mortgage papers, investments, bank statements, etc. This box should always be kept with you and not handed over to anyone.

Finally, speak to a qualified Real Estate Professional about what your home is worth in today's market.

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