

Downsizing Checklist for Seniors

Step 1: Create a plan

- Create a master calendar with important dates or milestones
- Decide on the moving date
- Hire or find help
- Ensure all new resident paperwork is completed
- Notify family and friends

Step 2: Know your floor plan

- Obtain a copy of the exact floor plan for your new apartment
- Measure the furniture you'll be taking
- Determine placement of furniture
- Schedule a community visit (optional)

Step 3: Box & remove items

- Start with a less utilized room.
- Sort belongings into categories: donate, sell, or move to the new home.
- Clearly label each box.
- Box up and remove items from each room until everything has been assigned a place.

Step 4: Let it go

- Host a yard sale or list items online
- Donate or pass down belongings to friends and family
- Recycle as much as possible, or order a dumpster from your trash collector.
- Consider hiring an estate management company if needed.

Step 5: Moving "housekeeping"

- Update your address with existing accounts (see next page)
- Notify your healthcare providers
- Notify the post office of your change of address
- Organize personal documents

Step 6: Day of move

- Unpack belongings
- Review activities calendar
- Become familiar with the community's common spaces
- Congratulate yourself for all the hard work you put into your move.

Preparing for a Move to Senior Living

Update your address on bank accounts, credit cards, subscriptions, other utility and service providers, friends, and family.

Not all of these entities may apply to you. However, it's helpful to identify which ones are most relevant to your situation.

Government agencies:

- Government & Public Offices
- Post Office
- Veteran Affairs
- IRS/State Tax Board
- Social Security
- Vehicle Registration/Driving License

Financial institutions:

- Banks
- Loan Institutions
- Pension Plans
- Major Credit Card Companies
- Department Store Credit Cards
- Accountant/Tax Consultant

Utilities:

- Electric
- Gas
- Water
- Garbage
- Telephone/Mobile
- Cable
- Internet
- Fuel
- Water Delivery/Water Treatment

Others:

- Pool Service
- Lawn/Garden Services
- Housecleaning Services
- Physicians
- Veterinarian
- Attorney
- Insurance Agencies (Health, Home/Life, and Auto)
- Air Miles Rewards Program
- Professional Memberships/Licensing Boards
- Newspapers/Magazines/Mail Order Houses
- Book/Music Clubs

