

Downsizing and moving guide

Congratulations on your decision. This guide contains downsizing checklists for seniors and helpful suggestions to make your move as easy as possible.

Paperwork checklist

Organize critical documents. First, place important information in a safe deposit box or fireproof safe. Second, scan vital documents and store them online. Third, tell your loved ones where they can find — and how they can access — all these vital documents.

What to save:

- Names, contact information, and brief descriptions of your doctors, attorneys, accountants, bankers, brokers and insurance agents
- Personal assets, including savings accounts, pension or retirement plan income; CDs; stocks; bonds; insurance policies; titles to cars, boats, homes, etc.
- Pictures or videos of your personal possessions — including approximate values of treasured possessions can be helpful in the event of an insurance claim
- List of any personal liabilities
- Copies of federal and state income tax returns from the past five years
- List and account numbers of checking accounts, savings accounts and credit cards
- Social Security and Medicare cards, passport, and birth certificate
- Trusts, wills, and any codicils or amendments, including durable power of attorney and advance directives
- A letter addressing any personal issues (e.g., your preferences for any end-of-life desires such as burial or cremation, any personal comments to friends or family)

Change of address checklist

Make sure all of the places you do business with, the services you use, and groups you're a part of know how to contact you at your new address by sending them a change of address card.

Financial Institutions

- Credit reporting systems
- Banks
- Investment broker
- Insurance companies
- Lenders

Government

- Department of Revenue (IRS)
- Department of Motor Vehicles
- Business license office (for small or home businesses)
- US Post Office

Memberships

- Professional associations
- Publications, subscriptions
- Civic organizations
- House of worship
- Health club
- Social or country clubs

Service Providers

- Accountant
- Attorney
- Cleaning service
- Lawn care/landscaper
- Physicians
- Veterinarian

Packing checklist

- Welcome others to help with packing chores: family members, friends, the move specialist or moving company. With everything pre-labeled, moving will be easy and fairly straight forward.
- Get markers and labels.
- Label all boxes with their destination room/area in the new residence.
- Moving companies can supply specialized containers, e.g., wardrobe boxes, so you can leave clothes on hangers or properly protect your flat-screen TV.
- Pack “open first” box(es). The contents are for setting up sleeping accommodations and the bathroom. Include items such as fresh bedding, soap, toilet paper, toothpaste & toothbrush, comb, nightclothes, towel, plate and utensils, one change of clothes, flashlight, tape, scissors, and a little cash. The cash is great for ordering a delivered dinner that night because moving always seems to take longer than we expect.
- Pack other important items that you’ll keep with you during the move: new lease or residence contract, keys, medications, legal documents, checkbook, cell phone, address book, first-aid kit. Label this container. Valuables such as jewelry should be in a safe-deposit box unless items are worn regularly.

Pre-moving day checklist

- Create a moving binder that includes key contacts, estimates, receipts, and an inventory of what you’re taking with you.
- Check with your mover — or moving coordinator — about final details.
- Schedule utility disconnects.
- Schedule your post-move-out cleaning services
- Be sure you have a written contract from the moving company and clear idea of coverage for lost or damaged possessions.
- Get a firm time for the moving company’s arrival, at both the old and new residences.
- Check payment options: credit card or check?

Moving day checklist

- Have someone assigned to meet the movers at your new residence. Be sure they have a key, and be sure the community manager is expecting you.
- Start cleaning out the pantry and deep freeze — remembering to reduce cleaning supplies, too.
- Check inventory lists.
- Ensure that all boxes are properly labeled.
- Ask a neighbor about watching for mail that might come after your move.
- If a pet's making the move with you, be sure to pack food and meds to ensure they will also have a smooth journey and safe arrival.
- Pack a suitcase with your own clothes and medicines, so after your first night, you'll be ready for the first day.
- Pack valuables and seldom-used belongings that you've chosen to pack yourself.
- Use the "open first" boxes to set up the bedroom and bathroom immediately.
- Prepare to spend a few days unpacking and organizing. Get someone to help if you can. Work as quickly as you can to make you new home feel comfortable