

NOTES

Simplify your Downsize - 5 Easy Steps for a Successful Move

STEP 1: Create a plan that works for you!

STEP 2: Surround yourself with professionals

STEP 3: Communicate with family and friends

STEP 4: Dealing with a house full of possessions

STEP 5: Adjust to your new lifestyle



Want to talk to someone? 479-717-7710

QUESTIONS TO CONSIDER

before you move

WHAT TYPE OF LIFESTYLE DO I NEED AND/OR WANT?

- Do I need assistance with health care or meals? Now ? Future?
- Do I need transportation? Now? Future?
- Can I live Independently? If so, for how long?
- Do I want to stay close to my current home or move out of the area?
- Is my family Involved? If so, In what way?
- Do I have friends or activities that I want to stay near?
- What type of activities do I enjoy?
- Do I want apartment style living, an age segretated community, a private residence, a townhouse, a patio home or other arrangement?

WHERE DO I STAND FINANCIALLY?

- What is my current monthly income?
- Will my income change? If so, what will my future income look like?
- How much do I have in savings and investments?
- How much equity will I receive from the sale of my home?
- How much will I realistically earn from the sale of my household belongings?
- What are my monthly/annual expenses?
- To what degree will my family be contributing to my moving and/or living expenses?
- What benefits might I have that will offset current or future housing needs?

WHAT IS NECESSARY TO PREPARE FOR A FUTURE MOVE?

- Which items do I want to keep/take to my new home?
- Who will assist me with the details of the move? Friends? Family? Pros?
- What date or time of year would I prefer to make a move?
- Will my home require repairs prior to selling?
- What have I learned from others who have been through this?
- Will my physician need to be consulted regarding my choice of residence?
- Who are the local professionals that can help with the move?



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HOUSING NEEDS CHECKLIST

	YES	NO	MAYBE
• Do I need/want a ground floor location?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need special accommodations for accessibility?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need assistance with any daily living activities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• (bathing, dressing, medications, toileting)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want meals provided?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want special parking for a vehicle?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want a place that will accept pets?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want a place that offers social activities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want maintenance/housekeeping provided?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want a yard, patio or porch?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I want to be close to my current neighborhood?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want to own?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Do I need/want to rent?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• What other factors are important to me as I consider making a move?			



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SORTING 101

To keep....or not to keep

Sorting through household Items and a lifetime of memories can be one of the most time consuming and emotionally difficult tasks associated with any move. Consider hiring a professional move manager who will provide personalized, objective assistance in helping you organize and sort your belongings. They can assist you with decisions about what to keep, what to discard and what to do with the rest.

Consider the following categories when sorting your belongings:

- **Necessities** - furniture, toiletries, eating utensils, clothing, etc

- **Family heirlooms** - jewelry, dishes, furnishings, etc.



◦ **TIP:** pass these along to appropriate parties or store in a safe location for later distribution. It is best to have family members come get their Items prior to entering into an estate sale contract.

- **Sentimental items/keepsakes** - gifts, photos, souvenirs



◦ **TIP:** Some items must be stored in temperature controlled areas.

- **Disposables** - items with no sentimental value and not required for the new residence



◦ **TIP:** No need to organize, sort or clean these items during your move. The liquidators will empty cabinets, drawers, garages, storage buildings, attics, etc. Most prefer you NOT try to help them with this task!

- **Charitable donations** - musical instruments, craft supplies, books, furniture



◦ **TIP:** Some liquidation companies will handle this task on your behalf after the sale. It applies to items that do not sell and for which you have given your permission to donate. Be sure to get a receipt for tax purposes. Professional move managers can assist.

- **Trash** - If having an estate sale/auction, let the professionals decide what is trash

- **Valuables** - Marketable Items with resale value