

How to plan for a Senior Move

While moving is a chore, to say the least, for anyone it is even more so for elders who have lived in the same home for decades where they have raised a family, made memories and spent so much of their lives decorating and creating just the right environment. All wonderful; however, the accumulation of artwork, furniture and so many memories necessitates as much planning and forethought as possible when it comes to downsizing. No matter the size of home one is moving from, I always recommend that clients consider utilizing an *Estate Sale* company. An estate sale not only provides an opportunity to reduce the amount of belongings in a single day but is also a great way to add funds to one's savings.

So how is the best way to plan for an estate sale and ultimately a big senior move? With advance planning and establishing a schedule it's not as difficult as one might think!

SENIOR MOVING LIST

THREE MONTH BEFORE MOVE
<input type="checkbox"/> Whether selling the family home or ending a lease make a list of repairs needed. For example if selling, review list of necessary reparations and hire contractor(s) to make necessary repairs, replace flooring, etc. If renting, locate copy of move-in report.
<input type="checkbox"/> Create an album with photographs of your home and décor as a keepsake. To save on moving expenses start using up cleaning supplies as well as packaged, canned and frozen foods.
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<input type="checkbox"/> Begin going through items stored in the attic, basement and storage shed to decide what you want to keep and that which you will no longer need. Sort into keep, sale and donate piles then pack accordingly.
<input type="checkbox"/> Organize legal and financial documents (i.e. wills, health care proxy, living will, motor vehicle registration, bank and investment accounts, insurance). Arrange to obtain any missing records.

TWO MONTH PRIOR TO MOVE

<input type="checkbox"/> Going one room at a time, inventory belongings and decide what you need to keep, what needs to be sold, which will go to family members and identify items you would like to donate. Good rule of thumb: If you've not worn or used it in the past year it is probably something you do not need to keep. Also, post it notes are especially handy when identifying which items go where, using different colors for moving, selling, donation and giving away.
<input type="checkbox"/> Make a list of charitable organizations with contact information and pick-up schedules.
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<input type="checkbox"/> Create a list of all everyone you will need to advise of new address (i.e. friends, magazine subscriptions, creditors, utilities, lawyer, financial advisor, accountant, medical care providers, veterinarian).
<input type="checkbox"/> Make a list of charitable organizations with contact information and pick-up schedules.
<input type="checkbox"/> Make arrangements to hire an <i>Estate Sale</i> company and schedule appraisals and estimates.

ONE AND A HALF MONTH PRIOR TO MOVE
<input type="checkbox"/> Obtain or create a floor plan of new home with measurements to ensure ample room for what you plan to move.
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<input type="checkbox"/> If renting, notify landlord and request deposit reimbursement.
<input type="checkbox"/> Schedule estate sale and donation pick-up. <input type="checkbox"/> Hire moving company and get estimates for packing, moving, etc
<input type="checkbox"/> Arrange to have records transferred (i.e. medical, prescription, insurance including disability and long term care, Social Security benefits).

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| <input type="checkbox"/> Order banking checks with new address. |

ONE MONTH PRIOR TO MOVE

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| <input type="checkbox"/> Contact insurance company to establish insurance coverage for new residence be it home owners or renters. |
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| <input type="checkbox"/> Contact utility companies and service providers to schedule connection of services one day prior to moving to new location and disconnection of services (i.e. telephone, electric, gas/propane, water, waste management, cable and internet) one day after moving from current residence. |
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| <input type="checkbox"/> Complete and submit a change of address form to current post office for each resident in your household. |
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| <input type="checkbox"/> Send a change of address to individuals, providers and companies (i.e. friends, magazine subscriptions, creditors, utilities, lawyer, financial advisor, accountant, medical care providers, veterinarian). |
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THREE WEEKS PRIOR TO MOVE

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| <input type="checkbox"/> Request a referral from dental and medical providers. |
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| <input type="checkbox"/> Obtain tax assessment. |
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| <input type="checkbox"/> Obtain safe deposit box and, if necessary, bank accounts in area of new residence. |
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| <input type="checkbox"/> Schedule maintenance of personal vehicle for a safe move! |
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TWO WEEKS PRIOR TO MOVE

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| <input type="checkbox"/> Arrange for discontinuation of delivery services (i.e. bottled water) |
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| <input type="checkbox"/> Return any items borrowed or rented (i.e. library books, DVD/videos) and collect those which you have loaned out. |
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Pick up dry cleaning, lay-away, etc.

If moving out of and/or into a residence that has an elevators, contact management to arrange use of elevator.

ONE WEEK PRIOR TO MOVE

Contact mover to confirm details (i.e. payment, loading and move dates).

Drain water hose and fuel from outdoor equipment (i.e. lawnmower, leaf blower, snow blower).

Obtain directions to new residence and provide to moving company along with current and new home phone, cell and emergency numbers.

Pack current local phone book for future use along with supplies you will need to first few weeks post move.

Organize medications and important papers including move documents and phone numbers for day of move.

Pack boxes of personal items (i.e. shampoo, soap, shaving cream, lotion) bed, bath and kitchen linens, cookware, dishes, glasses, mugs, utensils, kitchen staples and detergent for use in the first 2-3 weeks in new home.

Label all items that are not to be moved by moving company.

Clean oven and microwave.

Set aside clothing you will need for the first couple of weeks in your new home.

ONE DAY PRIOR TO MOVE

Defrost and clean freezer and refrigerator.

Confirm utilities are turned on in your new home.

You might want to keep a cooler on hand for the day of the move. Pack healthy snacks to keep your energy up on moving day.

Pack medication, clothing and toiletries. Keep glasses, keys, wallet, directions, cell phone, etc. available for the big day and get a good night's rest!

THE BIG DAY HAS ARRIVED AND IT'S TIME TO MOVE!

Make sure you are available to answer any questions the movers or others assisting you might have on moving day.

Pack your car with medication, documents, moving papers, glasses, directions, cell phone, etc. that you would like to keep with you.

Be sure to keep all moving documents as proof of payment, should there be a claim and for income tax purposes.

Do one final walk-thru before leaving ensuring each room, closet and storage area have been cleared. Check doors and windows to confirm everything is locked. Turn off lights.

Transfer keys and garage door openers.

You might wish to take pictures when closing up as you could need photographic evidence of leaving your home in good condition.

Congratulations on a job well done and enjoy your new home!