



Downsizing & Moving

Countdown to Moving Day Checklist

The clock is ticking! Moving into a senior living community doesn't happen overnight. It requires a bit of preparation, both for the move itself and for transitioning your loved one into a new home. Many families have found success by hiring senior move and relocation specialists who can bridge the gap between well-meaning families and your anxious loved one. Ask your senior living community for recommendations.

If you decide to manage the process yourself, here's a week-by-week checklist to help you settle your loved into their new home.

Week 6: Get Organized

- Visit the community for a floorplan, room/closet measurements, and list of suggested items to bring.
- Put family heirlooms, jewelry or other valuables into safekeeping.
- Locate and scan your loved one's important documents and save them online, including:
 - Names/contact information of healthcare, legal and financial professionals
 - Identification (Social Security, Medicare, birth certificate, passport, driver's license, etc.)
 - Financial documents (banks, pension/retirement, investments, insurance, titles, and deeds)
 - Legal documents (wills, trusts, power of attorney, advance directives, etc.)
 - Account information (checking,

Deciding to move your loved one into a senior living community challenges everyone. But sorting through their things and moving out of what's often a lifelong home can feel like a significant loss to your loved one. Keep your loved one involved throughout so that they will feel a part of the process.

- savings, credit cards, etc.)
- Pictures/videos of valuables for insurance claims
 - List of personal liabilities
 - State/federal income tax returns
 - Put these healthcare, financial and legal documents in your home or another safe place.
 - Let your loved one know where their documents are so they can locate them when needed.

Week 5: Schedule a Mover

- Ask your community for moving company recommendations.
- Get cost estimates and availability for three to five movers.
- Read their online reviews.
- Make sure your moving company is properly licensed and insured.
- Ensure that the mover you choose can move heavy and specialty items.
- Order moving materials (boxes, tape, markers, bubble wrap, etc.).
- Take pictures of everything in your loved one's home and send them to family members.
- Check the freezer and make plans to consume food or donate it before moving day.
- Recruit friends and family members to help with packing.

Weeks 3 and 4: Downsize and Pack

- Determine, with your loved one, which family members will be receiving what items.
- Label and set aside those items that will be going with your loved one to the senior community.
- Create areas for items that will go to family members or will be sold, donated, or discarded.
- Assess each item and put it in the appropriate area.
- Pack up each area and clearly label boxes according to their destination.
- Move out any items that are being discarded or donated.

Week 2: Finish it Up

- Finish packing up this week.
- Clean the home (or hire a cleaning service) and/or take care of maintenance issues prior to renting or selling the home.
- Make an appointment with your loved one's primary care physician or, if they're moving out of the area, find a new primary care doctor.
- Make a list of all medications and dosages.
- Check in with your loved one to make sure they're doing OK and have what they need.
- Make arrangements with family members to pick up or ship items to them.

Week 1: Take Care of Business

- Pack a box with all of the things that you'll need on the first night (bedding, toiletries, contract, clothing, pajamas, pet supplies, cash, etc.).
- Confirm with your loved one's new community that all paperwork has been completed.
- Confirm and finalize details with your mover.
- Get the community's gate codes or arrange for any access cards for moving day.
- Cancel existing utility and other services (electric, gas, phone, cable, lawn care, etc.).
- Get an emergency pendant for your loved one (if the community does not provide one).
- Make a list of companies and individuals who need to know about your loved one's new address.
- Visit the U.S. Postal Service for Change of Address forms.
- Let family and friends know about your loved one's new contact information.
- Put your loved one's schedule and new contact information in your devices.

Moving Day

- Assign someone to meet the mover at the new community.
- You're in! Prepare to spend the first couple of days helping your loved one unpack and get settled.



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