

# Downsizing with Purpose

A PRACTICAL GUIDE TO  
DOWNSIZING, PACKING, AND MOVING

*...for seniors and the families who support them.*



CLARITY • CONFIDENCE • COMPASSION

## A Note to Our Readers

This guide is brought to you compliments the Forevermore Homes Team of Coldwell Banker.

Whether you're just beginning to explore your options or actively preparing for a move, our goal is to provide clarity, comfort, and confidence as you navigate this important transition.

This guide is more than a resource—it's a reflection of our commitment to supporting seniors and their families with care, respect, and expertise. We hope it helps you feel informed, empowered, and encouraged, no matter where you are on your journey.

Warmly,

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# About the Forevermore Homes Team of Coldwell Banker

We are experienced Realtors® dedicated to supporting older adults through important life transitions. We encourage families to reach out early so we can offer clear guidance and help ensure the best possible outcome from the start.

Our team approach brings together time, talent, and trusted resources—including planning tools and workbooks—to simplify each step and reduce stress. We handle the emotional, logistical, and financial details with care, respect, and expert insight.

When it's time to value and sell your home, we combine a thoughtful, individualized process with a strategic, business-minded approach designed to **maximize your home's value**. We protect your best interests—and your property—through skilled negotiation and decisions that help **preserve your assets so you can live comfortably long after you move**.

As Seniors Real Estate Specialists® and Certified Aging in Place Specialists, and through our active involvement with the Shoreline Elder Alliance (SEA) and area senior-focused networks, we bring deep knowledge and a strong commitment to serving the needs of older adults.

Our goal is simple: to deliver excellent results while ensuring you feel supported, organized, and confident every step of the way.



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# Introduction: A New Chapter Begins

Downsizing is more than a logistical task—it's a deeply personal journey.

Whether you're preparing for a move or simply feeling that your possessions are taking over your home, the desire to simplify and streamline your space often comes with emotional complexity.

You're not just organizing belongings— you're sorting through memories, making meaningful decisions, and envisioning a future that feels lighter, more intentional, and more aligned with your current lifestyle.



This guide was created to support you through that process.

Whether you're transitioning to a smaller home, a retirement community, or staying right where you are but seeking more breathing room, this workbook is your companion. It offers practical checklists, thoughtful prompts, and expert insights to help you stay organized, reduce stress, and feel confident in your choices. You'll also find space to reflect, plan, and prepare emotionally—because we know that letting go is never just about the stuff.

Most importantly, we want you to know you're not alone. Whether you're working with a professional, leaning on family and friends, or navigating this journey independently, support is available every step of the way.

Welcome to your next chapter—whether it's a new address or a renewed sense of peace in the home you love.

# The Emotional Challenges of Downsizing

Downsizing isn't just about space—it's about memories, identity, and change. It's completely normal to feel a mix of emotions during this process. Understanding these feelings can help you move through them with more compassion for yourself.

## Emotional Attachment

Letting go of items with sentimental value can be incredibly difficult. These objects often hold memories of people, places, and moments that shaped your life. It's okay to feel a sense of loss. Downsizing doesn't mean forgetting—it means choosing what to carry forward in a way that honors your past while making space for your future.

### **Reflection Prompts:**

- What items am I most emotionally attached to, and why?
- Is there a way I can preserve the memory without keeping the item—such as taking a photo, writing a story, or passing it on to someone who will cherish it?

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## Anxiety and Stress

Sorting through years—or even decades—of belongings can feel overwhelming. The pressure to make decisions, stay organized, and meet deadlines can create stress and anxiety. It's important to acknowledge these feelings and give yourself permission to move at a pace that feels manageable.

### **Reflection Prompts:**

- What part of the process feels most stressful to me right now?
- What small step can I take today to reduce that stress—even if it's just asking for help or taking a break?

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## Guilt

You may feel guilty about letting go of gifts, family heirlooms, or items that once held value. Guilt can also arise when you feel like you're "wasting" something by donating or discarding it. Remember, releasing an item doesn't mean you're dishonoring its significance—it means you're making space for what matters most now.

### **Reflection Prompts:**

- Am I holding onto anything out of guilt rather than love or usefulness?
- If I were advising a friend in my situation, what would I tell them about letting go with kindness and self-compassion?

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## Decision Fatigue

Constantly deciding what to keep, donate, or discard can wear you down. This mental exhaustion—called decision fatigue—can make even small choices feel overwhelming. Building in rest, routines, and support can help you stay energized and focused.

### **Reflection Prompts:**

- How can I pace myself or ask for help to reduce decision fatigue?
- Are there categories of items I can delegate or simplify to make the process easier?

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***You're not just sorting stuff—you're sorting stories. Be gentle with yourself!***

# Managing the Emotions of Downsizing

The emotions explored in the previous section are not only common, they're deeply human.

Rather than pushing these feelings aside, this guide encourages you to acknowledge them with compassion. Emotional awareness is a powerful tool—it helps you move forward with clarity, confidence, and self-kindness. You don't have to rush through this process or do it alone. Support is available, and pacing yourself is part of the plan.

As you work through each step, remember this is not just about what you're letting go of—it's about what you're making room for.

## Tips for Managing the Emotional Side of Downsizing

1. Acknowledge your feelings – It's perfectly normal to feel sad, anxious, or conflicted.
2. Communicate openly – Talk with family or friends about what you're experiencing.
3. Take it one step at a time – Break the process into small, manageable tasks.
4. Allow time for reminiscing – It's okay to pause and reflect as you go.
5. Keep a few special items – Create a memory box with mementos that bring you joy.
6. Focus on the positives – Think about the freedom, simplicity, and fresh start ahead.
7. Donate with purpose – Knowing your items will help others can bring comfort and meaning.
8. Celebrate small wins – Every drawer sorted or box packed is progress worth acknowledging.
9. Take care of yourself – Rest, eat well, and do things that bring you peace.
10. Ask for help – A professional move manager can guide you through the tough spots.

### **Reflection Prompt**

- Which of these tips feels most helpful to me right now?
- Are there any I'd like to try this week?

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# The Positive Impact of Downsizing

While downsizing often begins with difficult decisions and emotional challenges, it can also lead to profound personal growth and a renewed sense of freedom. This chapter is about embracing the possibilities that come with letting go and moving forward.

## Feeling Unburdened

Downsizing can provide a deep sense of relief. Letting go of excess belongings and clutter allows you to focus on what truly matters—your relationships, passions, and peace of mind. With fewer possessions comes less maintenance, fewer responsibilities, and more space—both physically and emotionally.

### **Reflection Prompts:**

- What responsibilities or burdens am I ready to let go of as I transition into this next chapter?
- What does “peace of mind” look like for me in a simplified space?

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## A New Chapter

This is more than a move—it’s a fresh start. A new living space offers the chance to reimagine your lifestyle, decorate with intention, and create a home that reflects who you are today. Whether you’re closer to loved ones, part of a vibrant community, or simply enjoying a quieter space, this is your opportunity to begin again.

### **Reflection Prompts:**

- What are some things I’m excited about in my new living space?
- How do I want my new home to reflect the person I am today?

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## Empowered Decision-Making

Successfully navigating the downsizing process is a powerful achievement. Each decision you make—what to keep, what to release, how to move forward—is a reflection of your strength and clarity. You're not just downsizing; you're reclaiming control and shaping your future with purpose.

### **Reflection Prompt:**

- In what ways has this process helped me feel more in control of my life and future?
- What strengths have I discovered or rediscovered in myself through this journey?

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*As you sort, decide,  
and let go, you're  
not just clearing out  
a home—*

*— you're uncovering  
resilience, clarity,  
and courage you  
may not have  
realized you had.*



# Getting Practical: Your Step-by-Step Plan

Now that we've explored the emotional and empowering aspects of downsizing, it's time to turn intention into action. This section breaks the process into clear, manageable steps to help you stay organized, reduce overwhelm, and move forward with confidence.

One of the most common missteps in downsizing is underestimating how long it takes. Sorting through a lifetime of belongings isn't a weekend project—it's a journey that requires time, energy, and thoughtful decision-making. That's why starting early is one of the most powerful things you can do. Even small actions—like measuring furniture or tagging items—can build momentum and make the entire process feel more achievable.

Remember the old saying: "A job begun is a job half done." Once you take that first step, you'll likely find that clarity and confidence begin to grow. Whether you're working with a professional or tackling this on your own, these steps will guide you from planning to packing—and everything in between.

You don't have to do everything at once. Take your time, ask for help when needed, and celebrate your progress along the way.

## Your Downsizing Roadmap

- **Step 1:** Plan Furniture Layout
- **Step 2:** Tag Furniture/Large Items
- **Step 3:** Sort & Categorize Belongings
- **Step 4:** Digitize Files & Photos
- **Step 5:** Sell Items of Value
- **Step 6:** Donate Items
- **Step 7:** Pack & Label Boxes
- **Step 8:** Discard Anything Left Over



***Starting early—one checklist, one measurement at a time—sets the tone for a smoother, more confident downsizing journey.***

# Step 1: Plan Furniture Layout

Building on the emotional and practical benefits we explored in the previous section, the first step in your downsizing journey is all about envisioning your new space—not just where things will go, but how your new home will feel.

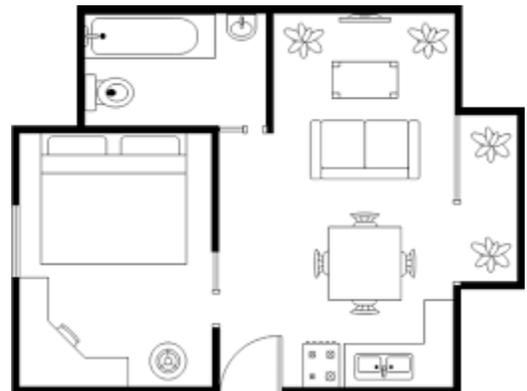
## Why It Matters

One of the most common frustrations during a move is discovering that beloved furniture doesn't fit in the new space. After hours of planning and heavy lifting, realizing a piece won't work can be disappointing, physically exhausting, and even costly. Planning ahead helps you avoid this stress and make confident decisions about what to bring with you.

But this step is more than just logistics—it's about intention. Thoughtfully planning your layout allows you to prioritize comfort, functionality, and emotional connection. It's a chance to design a space that reflects who you are today and supports the life you want to live.

## What to Do

- Obtain the floor plan for your new home or create one using a smartphone app like CubiCasa.
- Measure your furniture and place it on the floor plan to visualize what fits and what doesn't.
- Use digital tools like SmartDraw to experiment with different layouts.
- Consider traffic flow, lighting, and accessibility and allow enough space between furniture.



If spatial planning feels overwhelming, consider working with a professional move manager. They can help you create a layout that works, saving you time and potential frustration.

## Reflection Prompts

- Which pieces of furniture are most important to me, and why?
- How do I want my new space to feel—and which items will help create that feeling?

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## Step 2: Tag Your Furniture

Now that you've planned your furniture layout, it's time to make clear decisions about what's staying, what's going, and where everything is headed. This step brings your vision to life and sets the stage for a smoother, more organized transition.

### Why It Matters

Tagging your furniture early in the process helps reduce confusion later. It provides visual clarity for you, your family, and any professionals helping with the move. This step also helps prevent mistakes—like accidentally donating something you meant to keep. Tagging is a moment of commitment. It's where intention meets action. If you're working with a move manager, tagging helps them execute your plan with precision and care.

### What to Do

- Use color-coded labels to indicate what's moving with you, what's being donated, what you're gifting, what's being sold, and what's being discarded.
- Be specific with your labels:
  - Moving – to which room?
  - Donating – to what charity?
  - Gifting – to whom?
  - Selling – how (online, etc.)?
- Place tags in visible locations on each item—especially large furniture pieces.
- When tagging furniture, use caution with stickers—they can leave residue or damage delicate finishes. Painter's tape is a safer alternative.

	Move
	Sell
	Donate
	Gift
	Discard

### Reflection Prompts:

- Are there any pieces I'm unsure about? What would help me make a decision?

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**Resource: [Printable Color-Coded Template](#)**

## Step 3: Sort & Categorize Other Belongings

With your large items tagged, it's time to turn your attention to everything else—clothing, kitchenware, books, décor, and more.

Sorting through personal belongings can be one of the most time-consuming and emotionally charged parts of downsizing. A thoughtful approach helps you stay focused, avoid burnout, and make decisions that align with your goals and values.

### What to Do

- Plan your approach—decide whether to go room by room or sort by category (e.g., clothing, books, artwork).
- Allow more time than you think you'll need. Downsizing always takes longer than expected.
- Break it into small, manageable steps to avoid overwhelm.
- Be honest and realistic when assigning categories:
  - *Move* – Do I really need it? Do I really use it? Do I really love it?
  - *Gift* – Will they truly want it?
  - *Sell* – Does it genuinely have value?
  - *Donate* – Will the organization actually accept it?
- Ask yourself:
  - Do I really need 5 \_\_\_\_\_?
  - Do my kids really want my collection of \_\_\_\_\_?
  - Will the consignment shop really take my \_\_\_\_\_?

### Reflection Prompt

- What categories or rooms feel the most overwhelming to me, and how can I break them down into manageable steps?
- What items am I keeping out of habit rather than genuine need or joy—and how would it feel to let them go?

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# Step 4: Digitize Papers and Photos

After sorting your physical belongings, it's time to preserve the memories and important documents you want to keep—without taking up physical space. This step is both practical and deeply meaningful, offering a way to honor your past while streamlining your future.

## Why It Matters

Digitizing allows you to hold onto what matters most—letters, photos, videos, and documents—without the bulk. It protects fragile items from damage, makes sharing with family easier, and ensures that your legacy is preserved in a format that's accessible and secure. This step often brings up cherished memories and stories worth revisiting, making it one of the most emotionally rich parts of the downsizing journey.

It's also a chance to reflect on what you truly want to carry forward. Not every photo or paper needs to be saved—but the ones that do can be preserved with care and intention.

## What to Digitize

- **Paperwork** – Legal documents, letters, journals, certificates
- **Photos** – Loose prints, framed photos, photo boxes
- **Slides and Negatives** – Often stored away and forgotten, but full of history
- **Albums and Scrapbooks** – Scan page by page to preserve layouts and handwritten notes
- **Video Tapes** – Convert VHS, Hi8, or MiniDV to digital formats before they degrade

You can do this yourself using a scanner or smartphone apps or hire a professional digitizing service to handle delicate or time-consuming items. Many services offer cloud storage or USB delivery, making it easy to share with loved ones.

## Reflection Prompts

- What memories or documents do I most want to preserve for myself or future generations?
- What stories do these items tell—and who might benefit from hearing them?

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## Step 5: Sell Items of Value

Letting go of items can be emotionally challenging but selling them can offer a sense of closure and purpose. It's a way to honor the usefulness of your belongings while making space for what's next. Selling items of value can help offset moving costs and ensure your belongings find new homes where they'll be appreciated.

That said, it's important to approach this step with realistic expectations. A common mistake is overestimating the market value of personal items. While many possessions hold sentimental worth, their resale value may be far lower than anticipated. Trends shift, demand varies, and used items—especially furniture and collectibles—often sell for a fraction of their original cost. Recognizing this early can help you avoid frustration and make more informed decisions. The goal isn't to maximize profit—it's to lighten your load and move forward with clarity.

### DIY Selling Options

- Online Marketplaces – Platforms like *Facebook Marketplace*, *Craigslist*, and *eBay* allow you to reach a wide audience.
- Garage or Yard Sales – Host a local sale to attract neighbors and community members.
- Consignment Shops – Partner with local stores that sell your items on commission.

### Tips for Selling Items Online

- Take High-Quality Photos – Clear, well-lit images help showcase your item's condition.
- Provide Detailed Descriptions – Include dimensions, condition, and any unique features.
- Price Competitively – Research similar listings to set a fair and attractive price.
- Respond Promptly – Timely replies build trust and increase the chance of a successful sale.
- Secure Communications – Keep all messaging within the platform to protect your privacy.
- Use Caution – If meeting buyers in person, choose public locations.

### Reflection Prompt

- Are there items I've been holding onto that could benefit someone else—and bring value to me in return?

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# Professional Estate Sale: How It Works

While DIY selling can be effective, sometimes it makes more sense—especially when you have a large number of items or high-value pieces—to work with a professional estate sale company. These experts handle the entire process, saving you time, reducing stress, and often maximizing your return.

Estate sale professionals bring experience, market knowledge, and logistical support to what can otherwise be an overwhelming task. They understand buyer behavior, pricing trends, and how to present items in a way that attracts serious interest. If you're short on time, emotionally drained, or simply want a hands-off approach, this option can be a smart and efficient solution.

## A Common Misstep: Overestimating Value

One of the most frequent challenges in this process is **overestimating the resale value of personal items**. While your belongings may hold deep sentimental worth, their market value is often much lower than expected. Estate sale professionals offer a realistic, research-based perspective on what items are likely to sell—and for how much. Trusting their expertise can help you avoid disappointment and make informed decisions about what to sell, donate, or discard.

Here's what an estate sale professional typically does:

### 1. Photograph and Catalog Items

The professional begins by carefully photographing each item, noting its condition, uniqueness, and potential resale value. They create a detailed inventory that helps determine whether a sale will be profitable after fees and expenses. This step also helps set realistic expectations—many people overestimate the value of personal items, so trusting the expert's judgment is key.

### 2. Recommend Selling Methods

Not all items are best sold in the same way. Estate sale professionals will advise whether certain pieces should be sold on-site during the sale, listed online for broader reach, or handled through specialty channels like auctions or consignment. Their goal is to match each item with the most effective selling strategy.

### 3. Determine the Timing

Timing can significantly impact turnout and sales. Professionals will schedule the sale for optimal visibility—often on weekends or during local events—and coordinate with advertising efforts to ensure maximum exposure.

#### 4. **Organize and Tag Items**

Items are grouped, staged, and clearly labeled to create an appealing and easy-to-navigate shopping experience. This includes pricing, categorization, and layout planning to encourage browsing and minimize confusion.

#### 5. **Promote the Sale**

Marketing is a major part of a successful estate sale. Professionals use a mix of local advertising, online listings, social media, email newsletters, and signage to attract buyers. Their network and experience help ensure your sale reaches the right audience.

#### 6. **Manage the Sale**

On sale day, the professional oversees the entire event—welcoming buyers, answering questions, and maintaining order. They manage customer flow, monitor security, and ensure that both the items and the home are treated with respect.

#### 7. **Handle Transactions**

From negotiating prices to processing payments, the estate sale company takes care of all customer service and financial transactions. This includes managing cash, credit card payments, and any applicable taxes or fees.

#### 8. **Reconcile and Distribute Proceeds**

After the sale, the professional provides a detailed summary of what was sold, settles any outstanding expenses, and distributes the net proceeds to you. They may also assist with clearing out unsold items, donating leftovers, or arranging for final clean-up.

Partnering with a professional estate sale company allows you to step back from the stress and focus on what matters most: preserving memories, protecting your energy, and preparing for your next chapter with clarity and confidence. Whether you're navigating this process alone or with loved ones, having expert support can make all the difference.



*Every Piece Has a  
Memory—and a New  
Home Awaits!*

# Step 6: Donate Items

After selling what you can, donating is a meaningful way to give your belongings a second life and support those in need.

## Why It Matters

Donating items can be deeply rewarding. It helps others, reduces waste, and brings purpose to the downsizing process. However, donation centers have specific guidelines, so a little research goes a long way.

## What to Do

- **Research Donation Centers**

Find reputable charities and non-profits that accept donations.

*Tip: Use 211 of Connecticut to locate local donation sites.*

- **Prepare Items for Donation**

Clean, disinfect, and ensure items are in good, usable condition.

- **Schedule Pickup or Delivery**

Many charities offer free pickup for large furniture items. If not, you'll need to arrange delivery.

- **Obtain Tax Receipt**

**Request a receipt to claim your charitable donation on your tax return.**

**Not every item will be accepted.** For example, most donation centers won't take mattresses. Each organization has its own list of accepted items, and these lists can change. Always call ahead to confirm what they will and won't take.

## Reflection Prompt

- What items could bring joy or comfort to someone else if donated?
- Which items served their purpose in your life—and could now serve someone else in theirs?

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## Step 7: Pack and Label Boxes

After donating what you can, it's time to start packing the items you've chosen to bring with you. A little planning here goes a long way toward a smooth move and easier unpacking. Packing isn't just about putting things in boxes—it's about protecting your belongings, staying organized, and making your first days in your new home more comfortable.

### Packing Tips

- Use the right size boxes – heavier items in smaller boxes, lighter items in larger ones.
- Secure the bottom of each box with plenty of tape before packing.
- Pack heavier items at the bottom to keep boxes stable.
- Don't overstuff – avoid making boxes too heavy to lift safely.
- Fill empty spaces with packing paper or crumpled newspaper to prevent shifting.
- Wrap fragile items with bubble wrap or packing paper.
- Keep medications and valuables with you or leave them with someone you trust.
- Create an "Unpack First" box with essentials for your first night.
- Label each box clearly with the destination and a brief description of contents.
- Use labels like "Fragile," "Heavy," or "This End Up" as needed.



*Every box you seal brings you one step closer to your next chapter.*

*Remember: you're not just moving things—you're moving forward. You've got this!*

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**Resources: [List of Packing Supplies](#)**

**[List of Items for Your "Unpack First" Box](#)**

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## Step 8: Discard Anything Left Over

After sorting, selling, donating, and packing, you may still have items that don't fit into any category. This final step is about clearing the last of the clutter—responsibly and efficiently.

### Why It Matters

Letting go of the last few items can feel like crossing the finish line. These are often the things that didn't sell, couldn't be donated, or simply aren't worth keeping. Clearing them out creates closure and makes space—physically and emotionally—for your next chapter.

### What to Do

- Rent a dumpster – Ideal for large cleanouts or bulky, unsalvageable items.
- Make trips to the dump – If you have the time and transportation, this can be a cost-effective option.
- Hire a junk hauler – Many companies will remove unwanted items quickly and responsibly.
- Leave it to your professional move manager – If you're working with one, they can coordinate disposal as part of their services.

### Reflection Prompt

- How does it feel to let go of the last few things? What am I making space for in my life by doing this?

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# Hiring a Mover

Once you've packed your boxes and prepared your home, it's time to bring in the professionals who will help you make the move. Choosing the right moving company can make all the difference in how smoothly your transition goes. A reliable mover will handle your belongings with care, communicate clearly, and help reduce stress on moving day.

## What to Do

- **Research Moving Companies**

Look for reputable, licensed, and insured movers in your area. Read reviews, check credentials, and get quotes from multiple providers.

- **Determine Your Needs**

Consider the size of your move, the number of items, and any special requirements—like large furniture, fragile items, or accessibility concerns. Communicate these clearly to potential movers.

- **Get Detailed Quotes**

Request written estimates from at least three companies. Compare costs, services, and timelines to find the best fit for your budget and schedule.

- **Schedule the Move**

Book your preferred company well in advance, especially during peak seasons. Provide a detailed inventory and note any special requests or access issues (e.g., stairs, narrow hallways).

- **Understand the Contract**

Review the moving contract carefully. Pay attention to liability coverage, insurance policies, and any additional fees. *Important:* If you pack the boxes yourself, movers are generally not responsible for items that are broken or lost. Clarify this in advance.

## Reflection Prompt

- What questions or concerns do I have about working with a moving company, and how can I address them before moving day?

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# Surviving Move Day

With everything packed and your movers scheduled, the final challenge is getting through move day itself. This section offers simple strategies to help you stay calm, energized, and in control.

Move day can be physically and emotionally exhausting. By preparing ahead and staying mindful of your needs, you can reduce stress and make the experience smoother for everyone involved.

## What to Do

- **Maintain Energy**

Keep hydrating beverages and nutritious snacks easily accessible throughout the day. Staying fueled helps you stay focused and avoid burnout.

- **Schedule Breaks**

Moving is physically demanding. Build in short breaks to rest, stretch, and recharge—especially if you're doing any lifting or directing activity.

- **Communicate Clearly**

Make sure everyone involved—family, friends, movers—knows the schedule, responsibilities, and any special instructions. A quick morning huddle can go a long way.

- **Be Available for Questions**

Stay accessible to your movers and helpers. Being present to answer questions or resolve issues quickly helps keep the process moving smoothly.

### ***Reflection Prompt***

- What can I do to make move day feel more manageable and less stressful for myself and those helping me?

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# Unpacking Your New Home

After surviving move day, the final phase begins—turning your new house into a home. This step is all about creating comfort, order, and a sense of belonging in your new space.

Unpacking can feel overwhelming, but with a thoughtful approach, it becomes an opportunity to start fresh. By organizing as you go and focusing on one area at a time, you'll create a space that reflects your needs and style from day one.

## What to Do

- **Unpack the Essentials Box First**

This box should include toiletries, a change of clothes, and anything you'll need for your first night. (See the suggested list in the resource section.)

- **Focus on One Room at a Time**

Start with the most important rooms—typically the bedroom and kitchen—to quickly establish comfort and functionality.

- **Organize as You Go**

Put items in their designated places right away to avoid clutter and make your new space feel settled.

- **Break Down Boxes**

Flatten and recycle boxes as you empty them to keep your space tidy and reduce visual stress.

- **Set Up Furniture First**

Arrange furniture before unpacking smaller items to create a clear layout and flow.

- **Use a Logical Order**

Unpack larger items first, then smaller ones, and finally decorative pieces.

- **Take Breaks**

Give yourself time to rest and recharge. Unpacking is a process, not a race.

- **Involve Everyone**

If family or friends are helping, assign specific tasks to keep things moving efficiently.

## ***Reflection Prompt***

- What small touches can I add to make this space feel like home right away?

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# Reasons to Use a Professional for Downsizing

Throughout this guide, we've mentioned the value of working with a professional move manager. Downsizing is more than just moving—it's emotional, physical, and logistical.

A professional brings experience, efficiency, and empathy to the process, helping you move forward with less stress and more confidence. Here's why it might be one of the best decisions you make during this transition.



## Benefits of Hiring a Professional

- **Expertise:** Professional downsizers are trained to efficiently sort, categorize, and manage belongings with care and strategy.
- **Stress Reduction:** They take the pressure off by managing timelines, logistics, and emotional decision-making.
- **Objective Perspective:** A neutral third party can help you make tough decisions without the emotional weight that often comes with personal belongings.
- **Injury Prevention:** Avoid the risk of lifting heavy items or navigating tricky spaces—your safety comes first.
- **Time Saving:** Professionals can complete the downsizing process much faster than going it alone, freeing you to focus on what matters most.
- **Network of Trusted Contacts:** From movers and junk haulers to donation centers and estate sale professionals, they bring a vetted network of resources to the table.

### *Reflection Prompt*

- What part of this process would feel easier or more manageable with professional support?

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# Creating a Coordinated Action Plan and Timeline

A successful downsizing journey begins with a clear, customized action plan and timeline. This isn't just a checklist—it's a vital communication tool that keeps everyone aligned, accountable, and moving forward with confidence.

Your plan should outline each action step, the person responsible, and a target completion date. It should be reviewed weekly by all parties involved—typically you, your move manager, and your real estate agent—and even more frequently in the final 2–3 weeks leading up to your move. These regular check-ins help prevent last-minute surprises and ensure that nothing falls through the cracks.

The specific tasks and timing will vary depending on your circumstances, including whether you're able to move before selling your home and which responsibilities you delegate to a move manager.

If it's financially possible, we strongly recommend moving out before listing your home. This approach can dramatically reduce stress and create a smoother, more dignified experience for senior homeowners. Once you've moved, contractor repairs, deep cleaning, and staging can happen without the disruption of having workers in your living space. You won't need to worry about daily tidying or being displaced multiple times a day for showings, inspections, or appraisals.

From a marketing perspective, homes often photograph better once furniture and personal items have been removed—especially if furnishings are dated or overly specific to your taste. A professional stager can bring in fresh, neutral pieces that appeal to today's buyers and help your home stand out in the market.

Most importantly, moving first allows you to begin settling into your new home without the emotional and logistical strain of juggling two major life events at once.

Your move manager and real estate agent should work in close partnership—ideally, joined at the hip—to coordinate your transition and ensure that your move and home sale are seamlessly aligned. The sample action steps on the following page are meant to give you a starting point. It can be tailored to fit your unique situation and should evolve as your needs and timeline become clearer.

## Sample Action Steps

- Interview and select a professional move manager
- Decide on your move date.
- Obtain or create a floor plan of your new space. Plan furniture layout.
- Research mover, obtain quotes and contracts.
- Start identifying furniture to keep, donate, gift, or sell.
- Begin sorting other possessions and decide what to keep, donate, gift, or sell.
- Notify gift recipients of deadline to pick up gifted items.
- Schedule consultations with estate sale professionals.
- Identify items to be sold and method of sale (estate sale, online, consignment, etc.)
- Select the mover and sign the contract to lock in your move date.
- Finalize furniture layout and tag large items.
- Continue sorting room by room or by category.
- Begin digitizing important documents and photos.
- Research donation centers and schedule pick or delivery.
- Conduct estate sale, list items for online, &/or arrange delivery to consignment.
- Reconfirm date with your moving company
- Pack remaining non-essential items.
- Schedule donation pickups.
- Arrange junk removal or dumpster rental (if needed).
- Arrange for a cleaning crew for the final cleaning after your move.
- Continue selling or gifting items.
- Pack remaining items, starting with less-used rooms.
- Prepare your "Unpack First" essentials box.
- Reconfirm move date and logistics with movers.
- Final clean out and removal of any left-over items.

# Packing Supplies

## Essential Packing Materials

- Boxes (small, medium, large)
- Specialty boxes (wardrobe boxes, dish packs, TV boxes, etc.)
- Packing Paper, Bubble Wrap, Packing Peanuts, Foam Sheets, etc.
- Tape Gun & Packing Tape
- Labels & Markers
- Stretch Wrap & Furniture Covers
- Gloves & Lifting Straps (Optional)

## Estimated Number of Boxes by Home Size

Home Size	Estimated Boxes Needed
Studio Apartment	10–20 boxes
1-Bedroom Home/Apartment	20–40 boxes
2-Bedroom Home	40–60 boxes
3-Bedroom Home	60–80 boxes
4-Bedroom Home	80–100+ boxes

## Additional Considerations:

- Minimalists may need fewer boxes than average.
- Collectors or hobbyists may need significantly more.
- Downsizing typically reduces the number of boxes needed, but packing materials for fragile or sentimental items may increase the total.
- Specialty items (art, electronics, china, etc.) often require extra padding and boxes.

it's generally better to slightly overestimate the number of boxes you'll need. Running out mid-pack can be frustrating and disruptive, especially if you're on a tight timeline. Box sizes matter—you may find you need more small boxes for heavy items than expected. Packing styles vary—some people use more padding or double-box fragile items, which increases box usage. Unforeseen items often pop up late in the process (e.g., attic, garage, or “junk drawers”).

Most major retailers do allow returns of unused boxes, especially if they're still flat and in good condition. Keep your receipts and don't write on boxes until you're sure you'll use them.

# First Night Essentials Box

## Personal Care

- Medications (keep with you)
- Toothbrush, toothpaste, floss
- Soap, shampoo, conditioner
- Deodorant
- Hairbrush or comb
- Lotion or skincare items
- Tissues and toilet paper
- Towels and washcloths

## Clothing & Comfort

- Pajamas or sleepwear
- Change of clothes for the next day
- Slippers or comfortable shoes
- Blanket or throw
- Pillow (if preferred)

## Bedding & Linens

- Sheets and pillowcases
- Light comforter or bedspread
- Mattress protector (if needed)

## Food & Kitchen Basics

- Snacks and bottled water
- Coffee/tea and a small maker or kettle
- Paper plates, cups, utensils
- Small pot or pan (if cooking)
- Dish soap and sponge
- Trash bags

## Important Documents & Valuables (Keep these with you.)

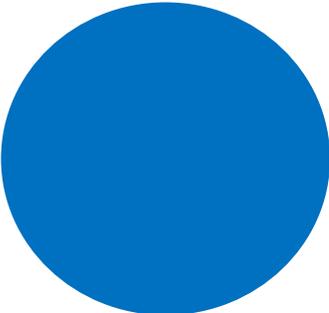
- Wallet, ID, insurance cards
- Health records or emergency contacts
- Moving paperwork and contracts
- Keys to the new home
- Cell phone and charger
- Cash or checkbook

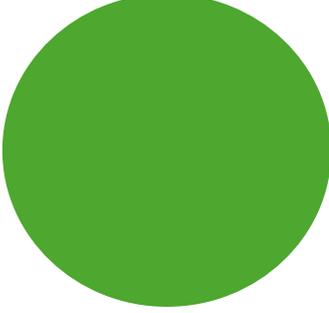
## Safety & Convenience

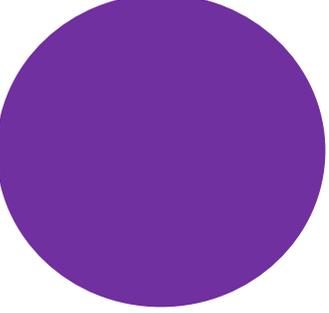
- Flashlight or nightlight
- Basic first aid kit
- Extension cord or power strip
- Scissors or box cutter
- Notepad and pen
- Basic cleaning supplies (wipes, spray cleaner)

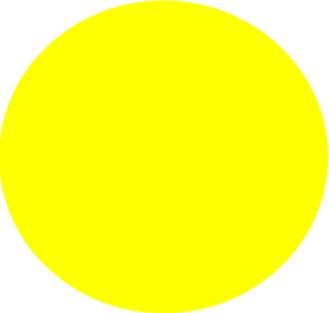
## Emotional Comfort

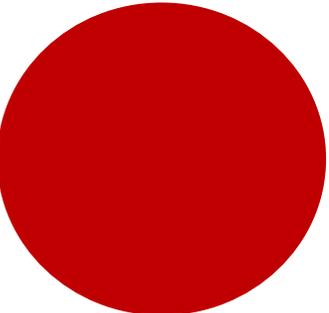
- A favorite photo or keepsake
- Book, crossword, or light entertainment
- A small plant or decorative item to make the space feel like home

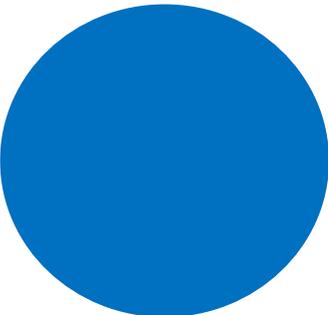
	<b>Move</b>	
	Where:	
	Room:	
	When:	

	<b>Sell</b>	
	How	
	Pick up by	
	Delivery to	
	Date	

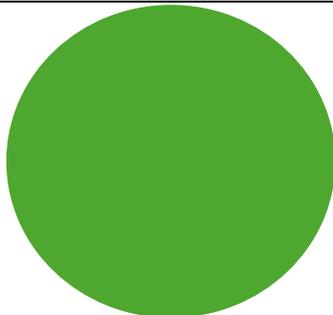
	<b>Donate</b>	
	To	
	Pick by	
	Delivery to	
	Date	

	<b>Gift</b>	
	To:	
	Pick by:	
	Delivery to:	
	Date	

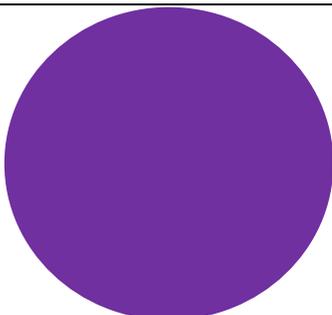
	<b>Discard</b>	
	By	
	How	
	Date	



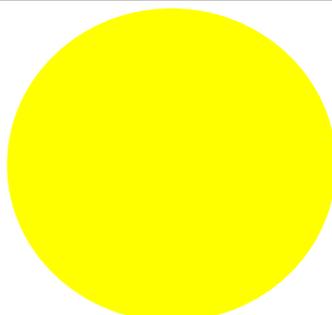
**Move**



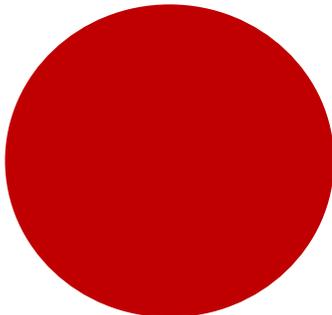
**Sell**



**Donate**



**Gift**



**Discard**

# Guide to Reviewing a Moving Contract

Before signing any moving contract, it's important to understand what you're agreeing to. This guide outlines key areas to review and questions to ask—but remember, this is not legal advice. Always consult an attorney if you have concerns or questions about your contract.

## **Legal Disclaimer**

This guide is for informational purposes only and does not constitute legal advice. Contract terms can vary widely, and it's always wise to consult with a qualified attorney before signing any legal document.

### 1. Company Information

- Is the mover licensed and insured?
- Are their DOT (Department of Transportation) and MC (Motor Carrier) numbers listed?

### 2. Scope of Services

- What services are included (e.g., packing, loading, transport, unpacking)?
- Are specialty services (e.g., piano moving, fragile item handling) clearly outlined?

### 3. Inventory List

- Is there a detailed inventory of items to be moved?
- Are high-value items listed separately?

### 4. Pricing & Payment Terms

- Is the estimate binding, non-binding, or not-to-exceed?
- Are hourly rates, flat fees, or weight-based charges clearly explained?
- Are deposits required? What is the refund policy?

### 5. Liability & Insurance

- What level of liability coverage is included?
- Is full-value protection available, and at what cost?
- What happens if items are lost or damaged?

*Note: If you pack your own boxes, movers are generally not responsible for damage to those items.*

### 6. Additional Fees

- Are there charges for stairs, long carries, fuel, or delays?
- Are packing materials included or billed separately?

## 7. Cancellation & Rescheduling Policies

- What are the terms if you need to cancel or change your move date?
- Are there penalties or fees?

## 8. Delivery Window

- Is there a guaranteed delivery date or range?
- What happens if the mover misses the delivery window?

## 9. Claims Process

- How do you file a claim for lost or damaged items?
- What is the timeline for resolution?

## ***Questions to Ask Before Signing***

- Can you walk me through the estimate and how it was calculated?
- What happens if the move takes longer than expected?
- Are there any hidden fees I should be aware of?
- What's your process for handling fragile or high-value items?
- What kind of insurance do you offer, and what does it cover?
- What's your cancellation policy?
- Can I see a sample contract before committing?