

# MOVING

## A GUIDE FOR DOWNSIZING



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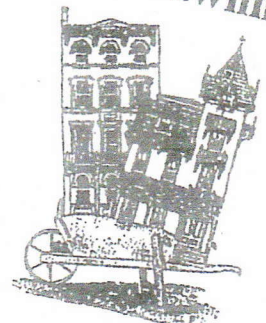
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# HOUSEHOLD DOWNSIZING

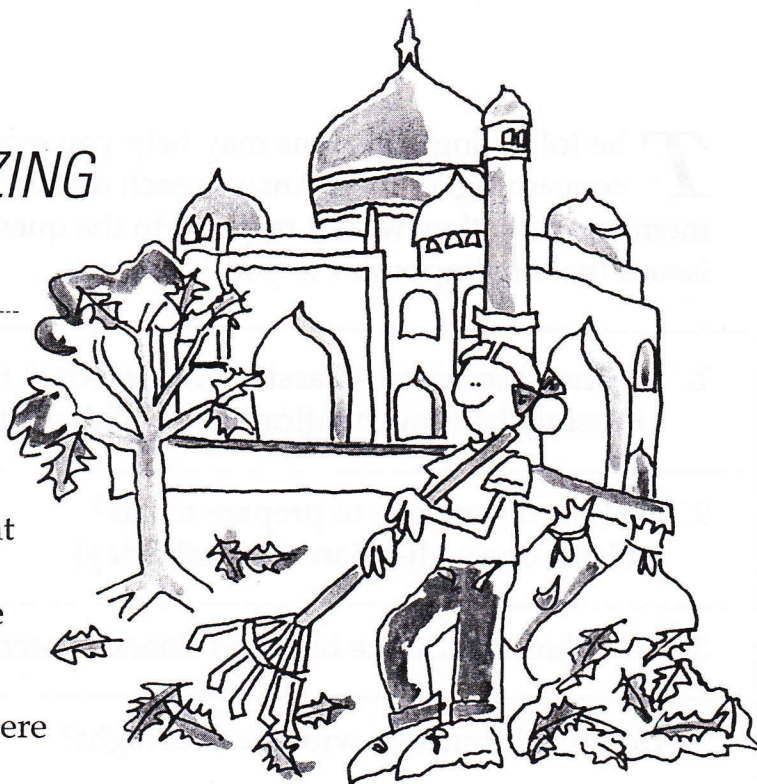
## Introduction

Change isn't something most of us take lightly. Our lives have been one change after another. Most of us feel comfortable in our surroundings and dread the thought of ever giving up our homes. Yet, sometimes our homes become more than we can handle.

The house where our children were raised, although it holds so many memories, may become more than we can or want to take care of. Keeping up with both inside and outside maintenance and repairs can sometimes seem beyond our control. **But how do we start to make a change to smaller quarters?**

This workbook will help you and your family decide if it is time for a move, how to find a new home, how to make that move and much more. The questions may seem too simple in some cases, but these are sometimes the most difficult to answer. Once you decide you want to make a move, this workbook provides a step-by-step process you can use and lists of resources you and your family will find invaluable.

And if you don't want to move but have to, this workbook should make it easier for you and all concerned.



## Why move?

Sometimes outside forces tell us "it's time"—our health, our children, the too-big house, our ability to stay alone. Some questions to ask are, "Do I really want to stay here as long as I can? What would I need to stay: someone to cook, clean, take care of financial records, or yard help?" The list goes on.

If you and your family disagree on the need for you to move, there are outside (neutral) sources who can help you evaluate the situation. The resources section at the end of this workbook suggests places to call. Social workers, discharge planners in hospitals, ministers, counselors, and physicians are among the people who can help you assess your living situation. Or they can help determine what modifications should be made (like having meals brought in, laundry sent out, etc.) for you to stay where you are.



THIS  
END  
UP



The following questions may help you evaluate your particular situation concerning a move. Answer each one for yourself, then ask family members how they would respond to the questions about you. Note any other issues that are important to you.

1. Do I need someone to assist with personal tasks?  
(dressing, bathing, medications, walking, etc.)  Yes  No  Sometimes

2. Do I need someone to prepare meals?  
(at least one well-balanced meal a day)  Yes  No  Sometimes

3. Can I handle routine bills and financial records?  Yes  No  Sometimes

4. Do I need someone with me overnight?  Yes  No  Sometimes

5. Do I need someone to assist with:  
yard work?  Yes  No  Sometimes

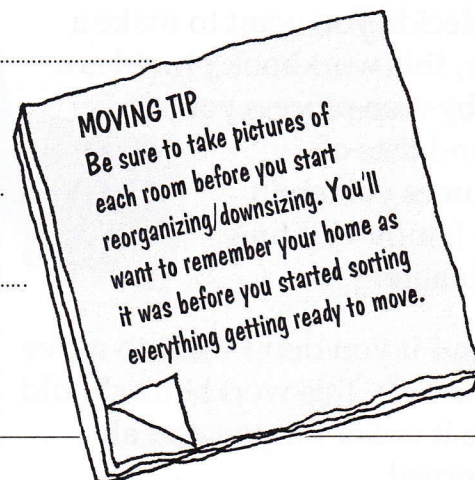
laundry?  Yes  No  Sometimes

cleaning?  Yes  No  Sometimes

grocery shopping/errands?  Yes  No  Sometimes

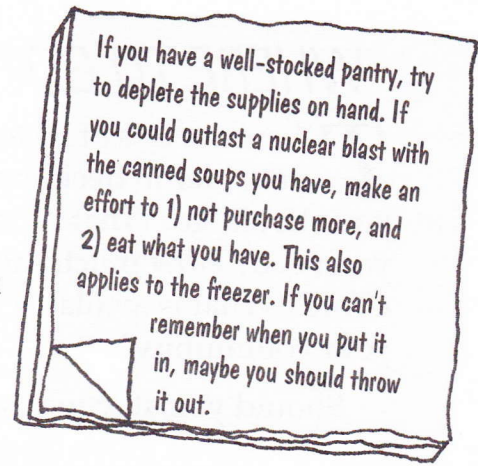
6. I need help with:

7. My family thinks I need help with:





**Y**ou may want to make a move but your spouse/children see this as “their” home and want you to stay there forever. Perhaps they aren’t aware that times change and you may not need as much space as you once did. Or you may know of major repairs needed for your house and don’t want to go through that experience. Ask yourself and your spouse/children these questions:



1. Is this house is too big/old/etc. for me now?  
 Yes     No     Maybe

---

2. Does it make sense to keep it when I don't use all this space most of the time?     Yes     No     Maybe

---

3. Does it make sense for me to spend what it takes to keep this house going when I could live more simply somewhere else?     Yes     No     Maybe

---

4. Do I feel isolated here?     Yes     No     Sometimes

---

5. Can I ask my children, grandchildren and/or friends to visit more and to help with chores, etc?     Yes     No     Maybe

---

6. The neighborhood isn't the same. Do I still feel safe here?     Yes     No     Maybe

---

7. Are many of the services I need still close by? (doctor, grocery, neighbors, pharmacy, etc.)     Yes     No     Maybe

---

8. Is this a good time to move? (season, to get family help, sell house, etc.)     Yes     No     Maybe

---

9. What are some of the other reasons to move?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

---

10. What are some of the other reasons not to move?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_



## WHERE TO GO?

There are lots of factors to consider in deciding where you should go. What services do you need? How much can you afford? What is available in your community?

Should you stay in your current area or move closer to your children/family?

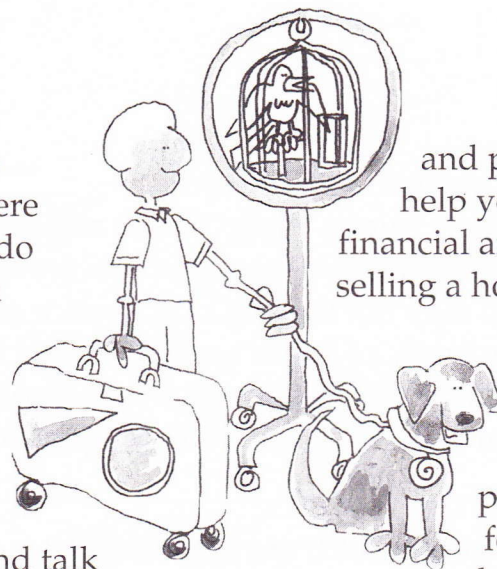
Think about these questions and talk to your family and friends. When you are making a move, you need to project some of your needs for the future. . . not just next month. Planning ahead can eliminate additional moves down the road.

If your children or other family members are in other parts of the state/country, you might want to consider moving closer to them. (Keep in mind corporations are mobile today. If your children are moving every few years, this might not be the best idea for you.)

Downsizing can mean moving into a smaller house, condo, an apartment, a retirement community, a seniors' residence, a group home, an assisted living facility or other. For an explanation of these terms, check the resource section on page 38. You and your family must decide what will work best for *you*.

### Financing

If you are in a quandary about how to finance your move, use the Evaluating Expenses chart on page 49. There are many programs (federal, local



and private) available to help you sort through the financial arrangements of selling a home and finding affordable

housing. Many times the equity in your home can provide the funds for your retirement home. Reverse

mortgages or renting your home are just two of the creative means to help you finance your move. Your accountant, attorney, tax preparer, financial planner, bank trust officer, or state social services agency are sources to help you find the answers. The main thing is don't be afraid to ask. This isn't something you do every day; you can't be expected to immediately know the best way to finance the choices you want. You worked hard for what you have now, so rely on the professionals to help you keep it.

### Choosing a new home

As you look for a new place to live, consider some of these thoughts: If you move to an apartment, house or condo, you may or may not have interaction with your neighbors or other people. You may feel somewhat isolated compared to living in your former neighborhood where you knew everyone and everyone knew you. Many seniors (especially widows and widowers) miss not seeing or talking with other people frequently and don't like eating alone.



# WHAT I NEED

1. Do I need a first floor (no steps) location?  Yes  No  Maybe

2. Do I need a handicapped accessible place?  Yes  No  Maybe

3. Do I need assistance with any daily living activities? (bathing, dressing, medications, toileting?)  Yes  No  Maybe

4. Do I need at least *some* meals provided?  Yes  No  Maybe

5. Do I need a place for my car?  Yes  No  Maybe

6. Do I need something on a bus line or with transportation provided?  Yes  No  Maybe

7. Do I need a place that will accept pets?  Yes  No  Maybe

8. Do I need something near:

grocery	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
pharmacy	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
church	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
doctor	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
employment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
therapy	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
bank	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe

other:

9. Do I want someplace that offers some social activities?  Yes  No  Maybe

10. Do I want a place with minimal maintenance/upkeep?  Yes  No  Maybe

11. Do I want a place with a yard, patio, porch, etc.?  Yes  No  Maybe

12. Do I want to:

own?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
rent?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe
partially own?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Maybe

13. Would adult day care provide the daytime assistance I need?  Yes  No  Maybe

14. What other factors should I consider in looking for a new home?







7. If you have children, how do they feel about your downsizing?  agree with  disagree with  
 no opinion  haven't discussed

8. Other family:  yes  no  
In this area?  yes  no  
How do they feel about your downsizing?  agree with  disagree with  
 no opinion  haven't discussed

9. Do you live in a:  house?  condo?  apartment?  other

10. Do you  rent?  own?

11. Length of time you have lived at this residence?  
 1-5 years  6-10 years  11-20 years  more than 21 years

12. Have you recently moved/downsized?  yes  no

13. The idea to move was  mine  my spouse's  
 my children's \_\_\_\_\_  
 other family member's \_\_\_\_\_  
 medical/physical necessity \_\_\_\_\_  
 other \_\_\_\_\_

14. Would you like to move into smaller living quarters?  
 yes  no  maybe

15. What type of home would you like to have?  
 apartment  condo  smaller house  
 seniors community  share with another senior  
 other \_\_\_\_\_

16. Can I count on spouse/children/other relatives to help with move?  
 yes  no  maybe

17. I want to move: month \_\_\_\_\_ year \_\_\_\_\_

18. I want to live in this area: neighborhood \_\_\_\_\_  
city \_\_\_\_\_ state \_\_\_\_\_

19. I will need help to make this move:  
 yes  no  maybe



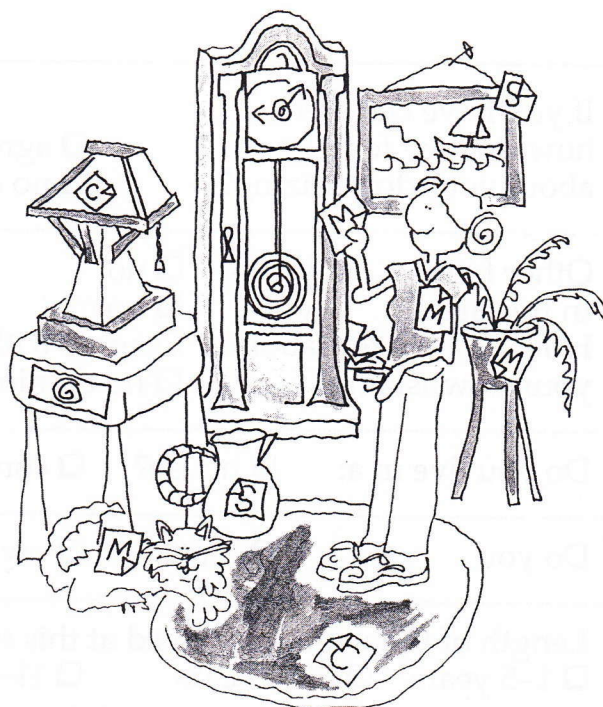
## WHEN TO START?

If you are toying with the idea of making a change, you can start today. You can think, sort, and talk about it. What else? After you have answered the questions on page 5, talk to your friends who have already made a move. Do they like where they are? What do they like best, least? Would they move there again if they could do it over? Are they the types of people who won't be happy *anywhere*? Weigh the opinions you get from others, but also weigh the information you get from the admissions/rental people.

Watch for ads in the newspaper or check the phone book for places that have the services you need/want. Schedule a visit and find out as much about them as possible. Eat a meal in the dining room; check out the various living arrangements. Use the chart on page 43 and compare prices/services.

Does the place you want have vacancies or must you put your name on a waiting list? This will give you some idea how long you have to get things in order for a move. Do you need to put a deposit down to hold the space you want? Is it refundable?

It might take you three to four months to sort things out and get ready for a move. With help, you might be able to do it faster, but you want to start as soon as possible—even if you don't have a move date established.



## WHERE TO START?

Once you have established you are going to make a move, you have crossed the biggest hurdle. The next step is deciding how to get the job done. It isn't going to be easy. But you have to start somewhere, sometime. Why not now?

**Involve spouse, children and family as much as possible.**

Use the inventory list beginning on page 10 to determine what items you will take to your new home, what family members will want and what needs to be disposed of. It helps if you know where you are going and what space you will have. But even if you aren't that far along in your planning, you know that some things will have to go. The sooner you identify those items and whether your family will take them or you will need to find new homes for them, the better.



If this seems like too much of a job, just do one room at a time. This will give you time to digest the inventory you have and think about what you want to do with it.

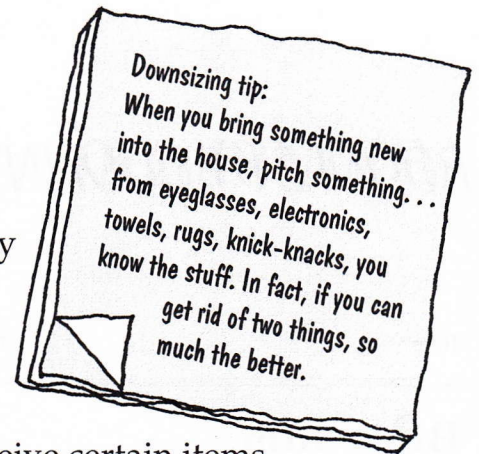
You might want to take pictures/videos of items that you want family members to take. Make measurements of extra large pieces to help determine if they have room for the piece and what it will require to move it.

If you want to designate items for specific family and friends, use stickers or sticky notes to identify items. . . select a color for individuals or use a number system.

For example, use a yellow sticky note to identify the items you want to move to your new home. Use another color for things that are to be sold or donated, and yet another color for items going to specific family members. (Or "M" for move, "S" for sell, etc.) **The trick is to write down what the different colors mean.** This is especially important when others are helping and on the actual day of your move.

When you use sticky notes you will find one of the best things about them is that they let you change your mind! What you decide to sell one day might be a treasure you want to take to your new home the next. Move the notes all you want now, for eventually you will have to **stick** with your decision.

If there are several children/family members involved, you may want to write letters or initials on the sticky notes to indicate individuals to receive certain items. (J is for John, M is for Martha, etc.)

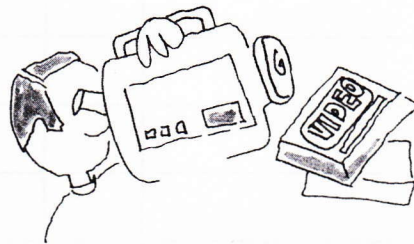


Before you move anything, take pictures/videos of each room as it is, from several angles. This will be a pleasant way for you and family members to remember each room

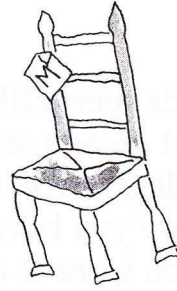
before it becomes disheveled with the move. Exterior shots are also a good idea. You may want to "pan" general neighborhood shots as well.

If you have a floor plan of your new home, you will have a better idea of how much/which furniture you can actually take. Measure your furniture and see where it will fit in your new place. Will a couch be too big? Would a love seat work better? If you have oversized furniture, be sure to measure heights of pieces and ceilings in your new home. (Graph paper and cut-out furniture is on page 55.)

Is there room in the bedroom for the chest of drawers and both bedside tables? Will my kitchen table fit? Where will my television and favorite chair go? Is there enough room for my dining room table, buffet, china cabinet. . . all or some? Will the color schemes that I currently use look nice in my new surroundings?



# ROOM BY ROOM INVENTORY/DISPOSITION



Item                                      Description/Measurements                                      Keep    Family\*    Sell    Dispose

## Bedroom

bed					
mattress	<input type="checkbox"/> single <input type="checkbox"/> double <input type="checkbox"/> queen <input type="checkbox"/> king				
chest of drawers					
night stand(s)					
blanket chest					
chair(s)					
lamp(s)					
rug(s)					
television(s)/radio(s)					
pictures/wall hangings					
other					

\* If you know which family member is to have a specific item, write their name/initials here



Item

Description/Measurements

Keep

Family\*

Sell

Dispose

## Bedroom 2

bed					
mattress	<input type="checkbox"/> single <input type="checkbox"/> double <input type="checkbox"/> queen <input type="checkbox"/> king				
chest of drawers					
night stand(s)					
blanket chest					
chair(s)					
lamp(s)					
rug(s)					
television/radio					
pictures/wall hangings					
other					

Item

Description/Measurements

Keep

Family\*

Sell

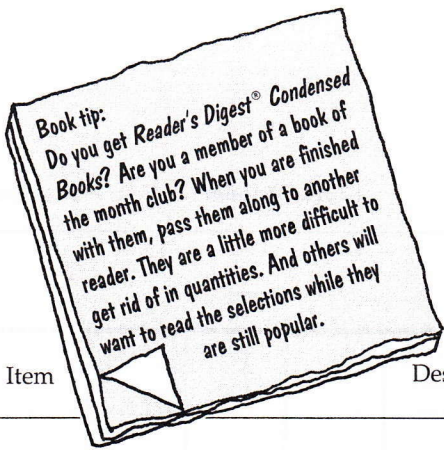
Dispose

### Bedroom 3

bed				
mattress	<input type="checkbox"/> single <input type="checkbox"/> double <input type="checkbox"/> queen <input type="checkbox"/> king			
chest of drawers				
night stand(s)				
blanket chest				
chair(s)				
lamp(s)				
rug(s)				
television/radio				
pictures/wall hangings				
other				

\* If you know which family member is to have a specific item, write their name/initials here





Item

Description/Measurements

Keep

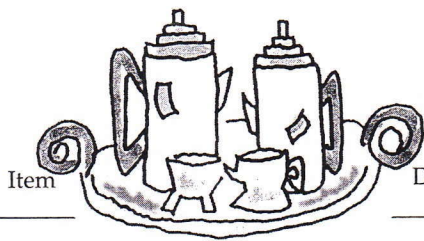
Family\*

Sell

Dispose

## Living room

couch	length style/color/fabric				
love seat					
end table(s)					
coffee table					
chair(s)					
secretary					
lamp(s)					
rug(s)					
stereo/audio equipment					
television					
pictures/wall hangings					
other					



Item

Description/Measurements

Keep Family\* Sell Dispose

## Dining room

table	size _____ style/wood _____ extra leaves for table _____ table pads _____				
chair(s)	number _____				
buffet					
china cabinet					
tea cart					
china	pattern _____ number of place settings _____ serving pieces _____				
crystal/glassware	pattern _____ number of each style _____ silver _____				
flatware sterling	pattern _____ number of place settings _____				
silver plate	pattern _____ number of place settings _____				
mirror					
rug(s)					
pictures/wall hangings					
other					

\* If you know which family member is to have a specific item, write their name/initials here



Item

Description/Measurements

Keep

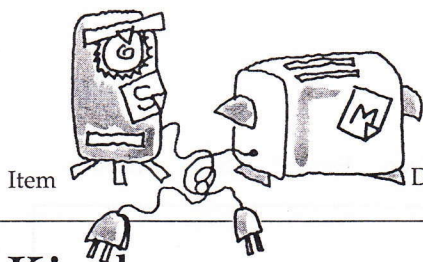
Family\*

Sell

Dispose

# Den

couch	length _____ style/fabric _____				
love seat					
chair(s)					
tables(s)					
lamp(s)					
rug(s)					
television/VCR					
stereo/audio equipment					
pictures/wall hangings					
other					



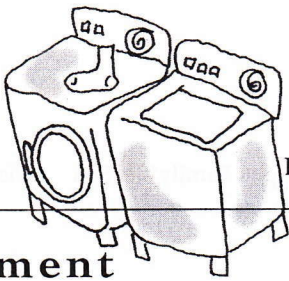
Item \_\_\_\_\_ Description/Measurements \_\_\_\_\_ Keep Family\* Sell Dispose

# Kitchen

stove	brand _____ age _____ <input type="checkbox"/> gas <input type="checkbox"/> electric				
refrigerator	brand _____ age _____				
table	size, style _____				
chairs	number _____				
microwave	brand _____ age _____				
small appliances					
dishes	pattern _____ place settings _____ serving pieces _____				
flatware	pattern _____ place settings _____ serving pieces _____				
cookware					
linens					
rug(s)					
pictures/wall hangings					
food items					
other					

\* If you know which family member is to have a specific item, write their name/initials here





Item

Description/Measurements

Keep

Family\*

Sell

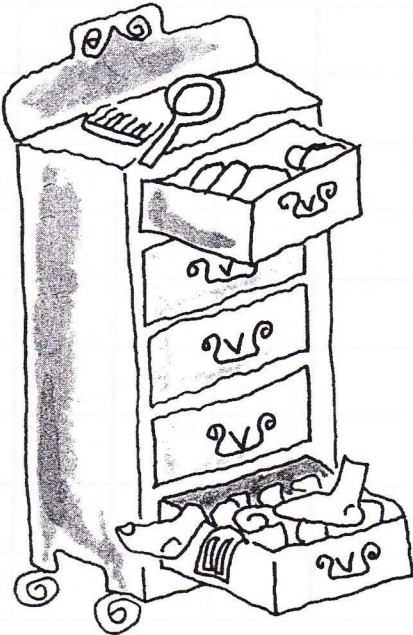
Dispose

# Basement

Item	Description/Measurements	Keep	Family*	Sell	Dispose
washer	brand _____ age _____ <input type="checkbox"/> gas <input type="checkbox"/> electric				
dryer	brand _____ age _____ <input type="checkbox"/> gas <input type="checkbox"/> electric				
exercise equipment	brand _____				
sewing machine	brand _____				
pool table					
furniture (list)					
tools (list)					
other					

# Attic

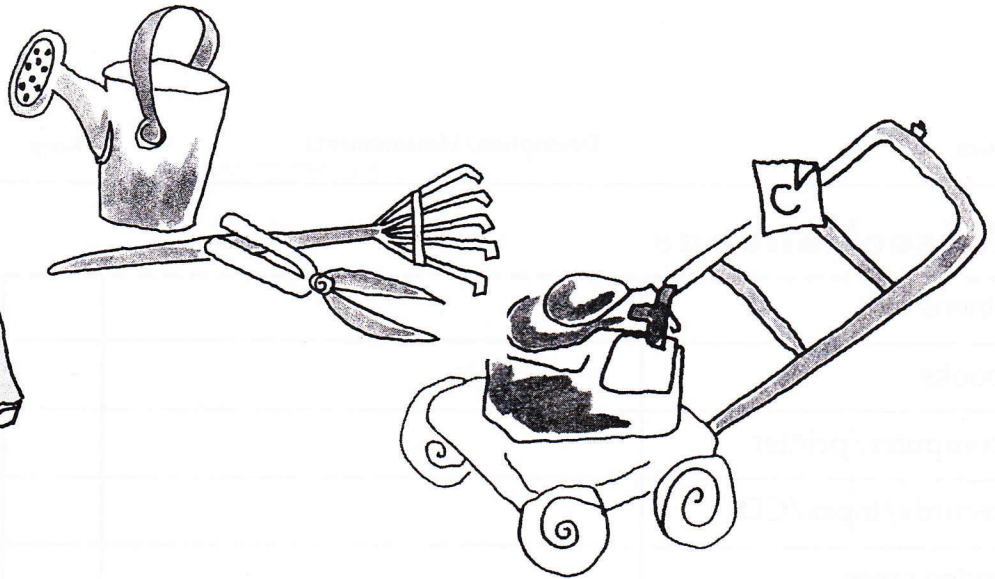
furniture (list)					
other (list)					



Look in your underwear, sock and nightwear drawer. Now pick out those gowns/pajamas that you have been saving for "good." Start tonight and wear something new. And place that well-worn favorite in the rag bag. Those comfortable undies with the elastic just about shot. . . pitch' em. (One man who recently downsized had 70 pairs of socks in one drawer—not the socks he currently wore, just old socks he refused to throw away!)



**Downsizing tip:**  
 This is a test: How many plastic butter tubs do you have? How many empty Cool Whip® containers? Frozen dinner trays? Now, how many do you use in a week's time? Take the first number, subtract the second and pitch the rest. That wasn't hard was it? It is a significant first step in downsizing your life.



Item

Description/Measurements

Keep

Family\*

Sell

Dispose

## Garage

Item	Description/Measurements	Keep	Family*	Sell	Dispose
car(s)	model _____ style _____ year _____				
tools (list)					
lawn mower	brand _____ age _____				
other (list)					

\* If you know which family member is to have a specific item, write their name/initials here

Item

Description/Measurements

Keep

Family\*

Sell

Dispose

## Miscellaneous

linens					
books					
computer/printer					
records/tapes/CDs					
video tapes					
collectibles					
plants					
holiday decorations					
piano/organ					
patio/yard furniture					
photo albums					
radios					
clothes					
shoes					
hats					
jewelry					
small electrical					
telephone(s)					
camera					
video camera					
other					

\* If you know which family member is to have a specific item, write their name/initials here



## GETTING THERE . . . IT'S THE LITTLE THINGS THAT ADD UP

While you're watching your favorite television program, especially if it is a rerun, take a drawer with you and a large garbage bag. Go through the items in that drawer and discard items you no longer need. Separate things that you will want to take with you from those items that need new homes. If you keep plodding away at it a little at a time, you will be surprised at how much easier it will seem when move time finally comes. Even if your move won't be for another year or so, this process works for simplifying your life now.

Take a tape recorder, spiral notebook or loose leaf paper and start writing down notes about special pieces you own. You may also take snapshots of room areas or knick knock shelves and identify items on the back. That small vase that doesn't look like much to others may be a special treasure from your childhood, travels, work life or activities. Even children who have been surrounded by those pieces all of their lives may not know



(or appreciate) the stories behind them. If you don't let someone know, those treasures may be on the dust heap before you know it. Heirlooms need to be noted for their origin: side of the family, dates, how acquired and any other data you can provide. If you aren't able to do the documentation, ask someone to help you. This could be one of the most valuable projects you can undertake.

If you have treasures—letters, pictures, mementos, you might want to combine them into a “memory box.” It will be an easy way for you to store and revisit items that are special to you.

If space will be limited where you are going, remember that passing along furniture, pictures, and other treasures to your family gives you another reason to visit them. . . to see your things in new surroundings. It will also be a way for your children to have a piece of their childhood home in their adult home.

If you have a gallery of photos on your walls and won't have the same



space in your new home, put those treasured photos in album(s). You can look at them whenever you like. As you reorganize, divide photos by families, so one day you can pass them along to those individuals.

If you have lots of pictures of family and/or travels and limited space, here are a few suggestions. Select some special shots and combine them into one or more album(s). Another idea is to convert your photo/slides to video tape. There are companies that will help you with this. Look in the Yellow Pages under video tape duplication and transfer.

If you have a collection of items (such as figurines), consider taking only a few representatives as a reminder, without the space requirements of the whole collection.

Remember the tip to mark items from your inventory list with sticky notes or color code things that will be going with you, items family members are going to take, items that will be sold or donated, or trashed. By using sticky notes, you are able to change your mind and move them around. But

this process is essential to getting the project started.

Items family members want can be the most frustrating. They may want these things, but they

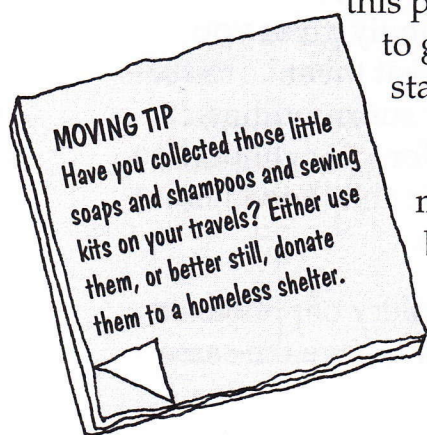
don't want to commit to coming to get them or arranging for shipment. It may be necessary to give your family deadlines for getting items out. If they can't pick them up, there are other ways to handle the situation. Movers, bus lines, and various shipping, packing and mailing places can help you here. Parcel post is often cheaper than professional movers. Professional movers may have minimum poundage requirements for a move. (See list of resources.)

## Planning ahead

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**I**n your new home make note of where electrical outlets are. This will help when placing furniture. You may need a power strip to use for multiple items like a bedside lamp, radio, clock, electric blanket, phone, and others. It is easier to have one of those strips handy as the movers are putting the bed together so you can have access to the wall before the furniture gets in place. Make note of where the cable TV hook-up is so you can arrange your furniture in a comfortable setting.

Measure the length, height, and depth of the closet space in your new home. Now, measure what you have in your present home. Simple arithmetic will tell you that you must eliminate some (many!) clothes, linens, coats, cleaning, and pantry items. Don't just expect to "transfer" things from one closet to another.





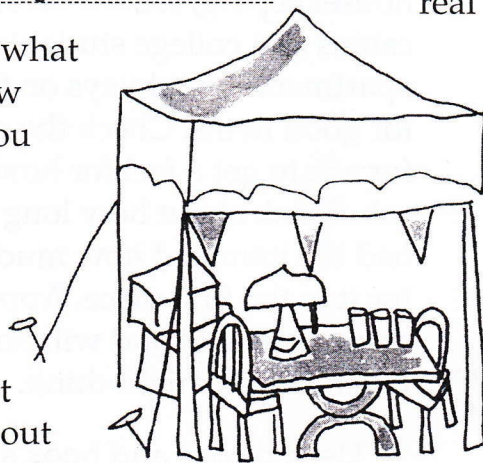
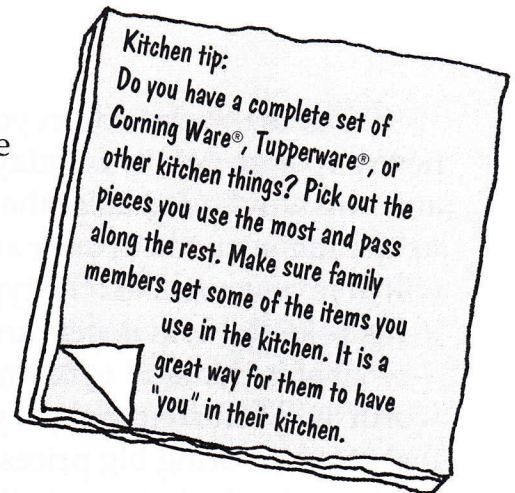
For increased closet space, consider adding a double rack in your new place. This would allow blouses/shirts and lightweight items to hang above skirts, pants and other short things. One section can be left for long, dress length things and robes. Hardware stores carry these closet supplies and there are companies that provide this service. Look in the Yellow Pages under "closet design/remodeling."

### Estate and yard sales

**B**e careful what you throw away. Items you consider very ordinary may have some value to a collector. . . and we are not just talking about antiques. Almost anything is collected these days. . . from reamers and baseball cards to pottery and even those ladies head vases we loved years ago. So while you may not want something and your family has no interest, have a reliable person give you an assessment of your belongings before you just chuck them out the door. Some of your smaller items may bring more than large furniture pieces.

A yard sale is one way to dispose of items you no longer want. But keep in mind they take a lot of work and the right location and may not generate the

money you hoped. There are services that will conduct a house/yard or "estate" sale for you. They are listed in the telephone book under estate sales. If you want to have an estate sale *after* you move, include this in your real estate agreement.



### Auctions



**A**nother way to make money from some of your belongings is to auction them. The auction can be at your home, or

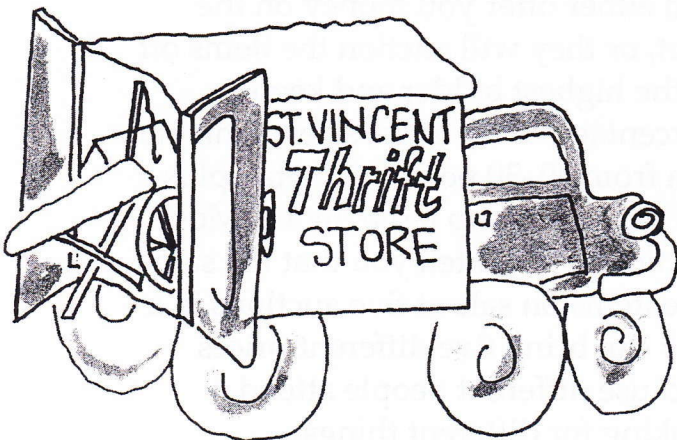
the auction house will take your belongings to their location for sale. Generally, the auction people will evaluate the items you have for sale and either offer you money on the spot, or they will auction the items off to the highest bidder and keep a percentage of the gross sales. (This can run from 20–30 percent of total, plus a fee for picking up large items.) Most auctioneers will tell you that the same five items on sale at five auctions in a row can bring five different prices because different people attend, looking for different things.



Check the classifieds in your local newspaper, generally Sunday editions, and you will find a list of the upcoming auctions in your area. This will give you a feel for the types of items sold. Various items run in cycles—what is in demand today may not be worth as much next month/year. Items that may not bring big prices at auction now may be the hot new collectible next year. Electronics (TV, recorders, etc.) return very little in relation to their cost due to changing technology. And because trends in home furnishings and colors change, that practically new sofa you have might not bring as much as you hoped.

If you own genuine antiques you want to sell, you should have your items appraised by a professional. Even if you are selling them individually to family and friends, you may want to know the current market value. Check the resource section on page 39.

You might want to consider selling big appliances (washer, dryer, refrigerator) by placing an ad in the



**Downsizing tip:**

Whenever the DAV, Amvets, or other organization calls and says a truck will be on your street on a given day, and asks if you have anything to donate, say "yes." The week or so lead time will give you enough warning and enough motivation to sort through some things. Every bagful of things you can donate before you move will be items you won't have to worry about where they should go.

local classifieds; and by all means, **tell everyone you know that you are going to be getting rid of things.**

Young people setting up housekeeping, folks with summer cabins and college students furnishing apartments are always on the lookout for good items. Check the newspaper for ads to get a feel for how much to ask. Think about how long you have had the item and how much you paid for it in the first place. Appliances depreciate a lot and will not return as much as you might think.

Used record and book stores may be interested in your collections. Check the Yellow Pages for the dealers closest to you. Some book stores have "out-of-print" book specialists who might be looking for some of the books you have.

If you have a collection of books on a special subject (art, gardening, sports, parapsychology, etc.), contact groups or organizations that deal in that subject. They could buy all or part of your collection; or you could donate the collection to share the resources with others who have the same interest.



## Consignments

**M**any areas have consignment shops that will take your goods to sell and you will receive a percentage of the selling price. Check some of the shops, antique malls and such in your area to get an idea of the items they sell. Find out what percent they charge, how long they will keep your items and what happens if the items don't sell. Some shops specialize in specific goods, furniture, styles and items. Do as much work by phone as you can. Some shops will give you cash and provide pickup service. If this is important to you, ask.

Many shops take new items only on certain days and times. Call before you drop in unannounced with a carload of things.

## Donations

**I**f you want to get rid of your belongings without selling them, you can donate them. There are a number of organizations that will come get your things. Some have drop-off centers. Think about organizations you support and find out if they take

donations of furniture, clothing, household items, books, tools, etc.

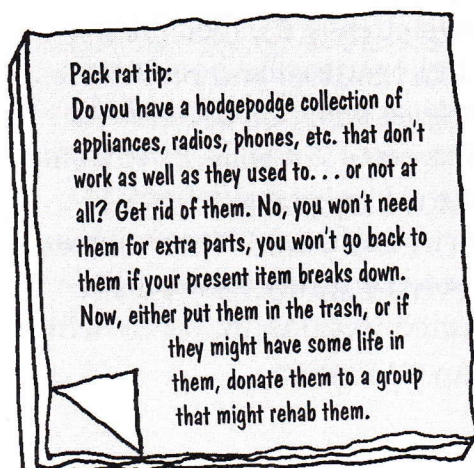
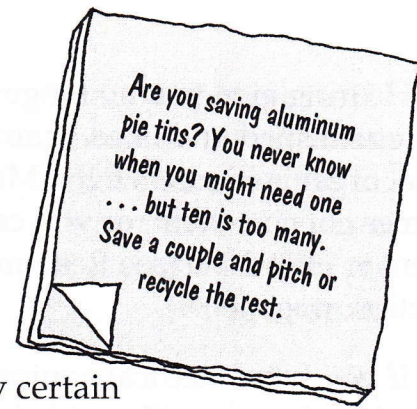
Some groups will take only certain items, and you might need to call more than one place. (A general list is in the resource section.)

Some libraries and/or schools have periodic used book sales. Watch for mention of them in the newspaper or call to find out if the one nearest you has such a sale. Ask what they will and will not take (hardback, paperback, magazines, Reader's Digest® Condensed Books, Book of the Month Club books, children's, first editions). Do they pick up?

Some charitable institutions send used text books and educational volumes to other countries. Consider donating your book collection to them.

Collections of figurines, dolls, toys, etc. might be appreciated by children at a local hospital. They could be put on display for many children to view. What a perfect way to share what you have enjoyed all those years.

Old eyeglasses you find in drawers can be recycled. There are several groups/organizations, such as the Lions Club, some churches, ophthalmologists, optometrists, and funeral homes, that collect old contact lenses and eyeglasses.



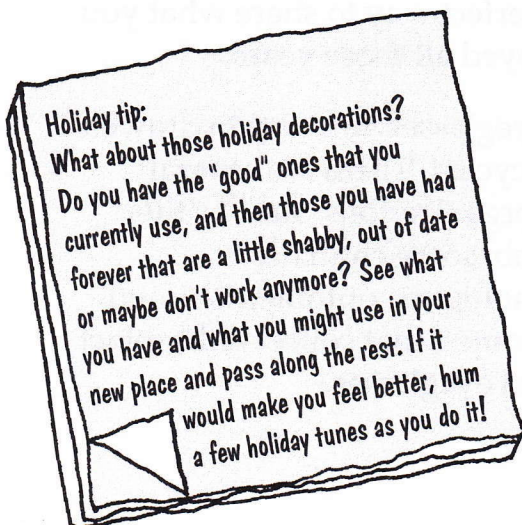


Hearing aids you no longer use can be refurbished and used again. Some local organizations like the March of Dimes collect them, or you can send them to *Hear Now* (see Resource Section, page 39).

If you have medical equipment/supplies that are still usable but you no longer need, groups like Hospice would be glad to have them. Specific items related to diabetes can be used by the American Diabetes Association or other organizations in your community. Homeless centers are frequently in need of health/medical supplies (walkers, braces, bandages, pads, crutches). Make a few calls and find someone who can use those things you no longer need. Ask if they can pick up the items.

Wigs and hair pieces you have but no longer want are welcomed by various groups serving cancer patients. Check your phone book for organizations providing these.

Nursing homes and adult day care centers welcome donations of craft or hobby projects, including leftover tools or supplies.



When making your donations, be sure to ask for a receipt so you can deduct the amount from your taxes. The amounts may not seem like a lot at the time, but, as with many small things, they add up. This goes for items picked up as well as dropped off. Sometimes it is necessary to ask for a receipt; organizations may not automatically give one.

### Internet sales

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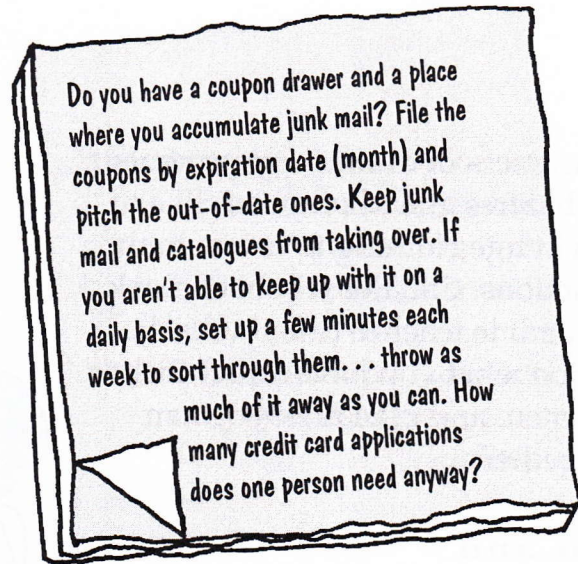
If you have access to the internet, there are many ways to find out what various items are worth. You may even sell them on line. You can research things collectors are seeking on America Online through their classified and collectible areas. Other popular websites are eBay, ([www.eBay.com](http://www.eBay.com)) and skybid ([www.skybid.com](http://www.skybid.com)), on-line auctions. Through Yahoo, AOL or other search engines, you can get comparative pricing on your items. Some provide names of collector clubs/organizations that can lead to additional information or outlets in your area (Avon bottle collectors, Beam bottle collectors, train memorabilia, to name a few). For non-computer people, there are books/newsletters for collectibles available in libraries and bookstores. *Kovels' Antiques and Collectibles Price List* and *Shroeder's Antiques Price Guide* are two of the largest guidebook publishers in this field. There are many books devoted entirely to specific items. Your collection might be worth more than you realize.



## Photos and documents

If you have old photos, letters, or other documents in which you or no one in your family has great interest, this could be the perfect time to donate them to the local historical society, college or university. Do not throw them away just because you don't want them. They could provide insight into life at another time. The same goes for old school yearbooks, financial records, diplomas and wedding licenses. Find good homes for them.

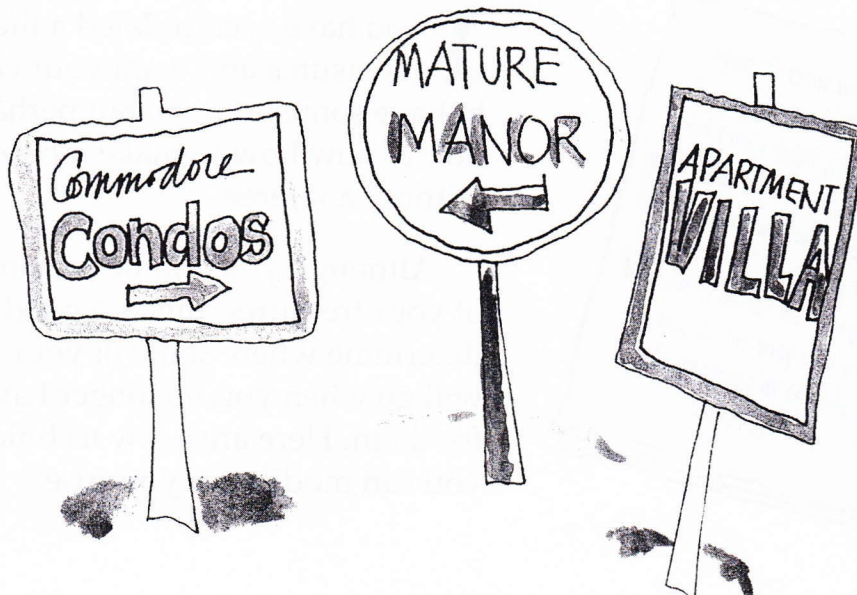
Old yearbooks are frequently needed by their respective schools to fill holes in their collections or as general archive material. Contact the administration or alumni office of the school; they might know a representative in your area who could pick up the book. (These books are generally heavy and you might not want to mail them, but don't let that stop you from trying to find someone who wants them.)



## Clothes

Many organizations will take used clothing. Consignment shops generally request items be clean and still have some wearability left in them. Other organizations might not be as picky. Call and check out your favorite charities to see if they have any requirements for donated clothing.

Certain vintage clothing is in demand. Check the telephone book for vintage clothing consignment shops that may be interested in your items. Call first; much of their work is done by appointment only.



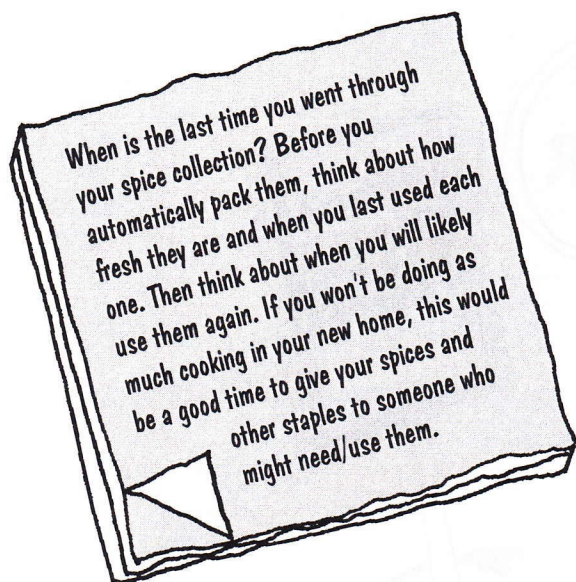


Some school drama departments, local theatres and playhouses like to have vintage clothing to use in their productions. Call the school and ask the drama teacher to call you back. Describe what you have, see if there's an interest, and plan how you can get together.

## Food and household products

If you move to a place that provides meals, you may have excess food on hand that needs to get to folks who can use it. Check the phone book to find names of local food banks or check with your church office to see if they know of anyone who could use your pantry items.

If you have an estate sale, many times they will be able to sell the leftover soap powder, cleaning products, and food items you have. Ask before you dispose of these. (The auction people might also be able to sell these things.)



The same applies for household cleaning supplies and yard paraphernalia if you are moving somewhere you won't need them. Some churches, camps, etc. appreciate having tools and yard equipment to maintain their property. Check it out.

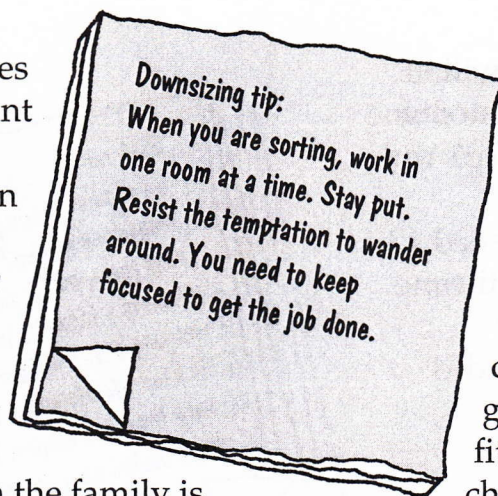
## Avoiding family feuds

You have accumulated a lifetime of treasures and want your children to have some of them, but perhaps you don't know how to make it happen without a referee.

Although you will be moving some of your treasures, this is a good time to determine where some of your things will go when you no longer have use for them. Here are a few techniques you can modify for your use.



Putting sticky notes on items that **you** want specific children to have has already been mentioned. It also works for items your children have noted that **they** want. But what do you do when all want certain things? When the family is all together, you can issue them an **equal** amount of play money and let them "bid" on the items they most want. This gives them a chance to get something that has more meaning to them, regardless of their actual budget. (The bidding and buying process can be done on paper as well as with play money.)



battle. But don't be too disappointed if the things you value most are of little interest to your children. People's decorating styles and tastes in general are different. And what looks great in your house may not fit the lifestyle of your children.

## Miscellaneous

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**W**hen you move to smaller quarters, you will find you no longer need four sets of sheets for each bed. A set on the bed and a set on standby is enough. You don't need as many sets of bath towels either. Pick your favorites and those special ones you reserve for guests and use them.

You also won't use as many items such as kitchen towels, potholders, etc. You may stop cooking altogether and just need something to dry your hands on and wipe up spills.

This is a good time to get rid of those big turkey roasters, serving platters and items you only use when the clan gathers.

If you have heirloom linens that you have used for holidays when the family gathers, consider offering them to whomever takes your dining suite. Some handmade linens, if they are in pristine condition, can be sold at auction.

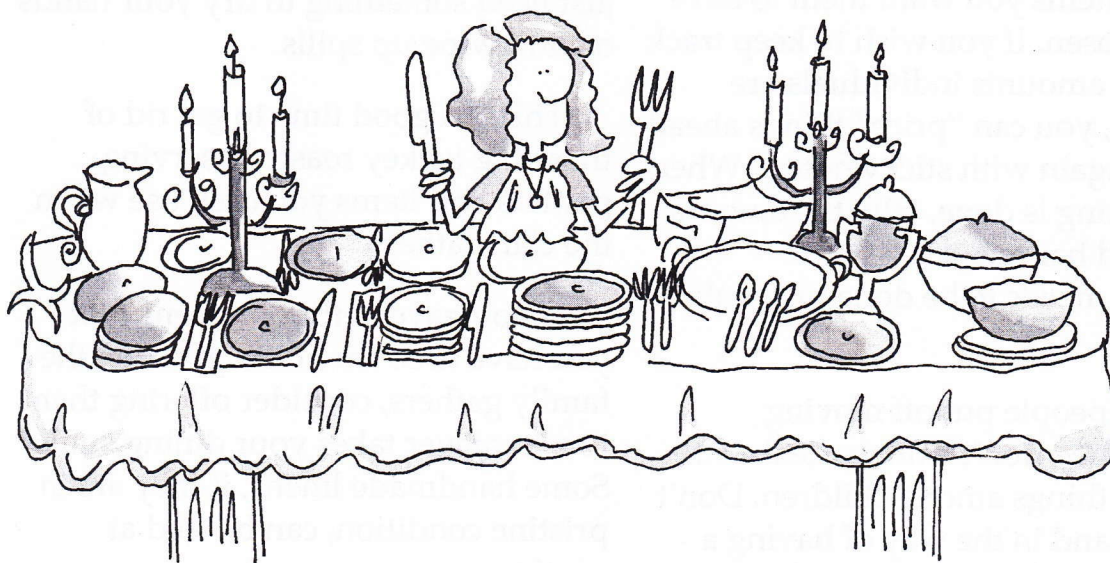
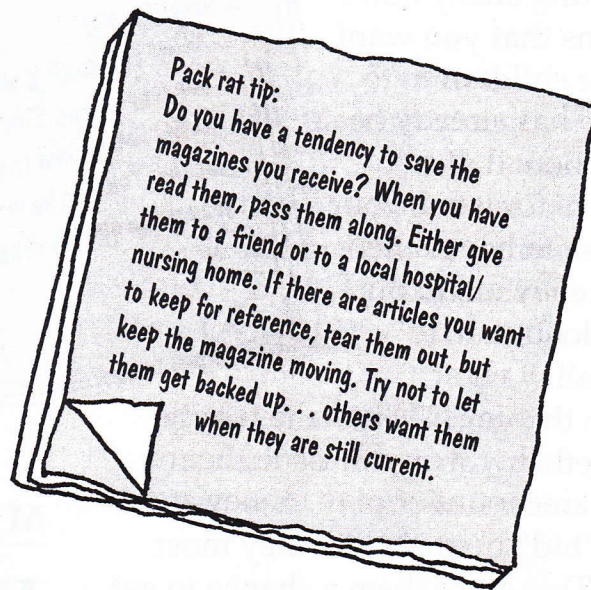
If you have more than one child, another easy technique is to let them each pick an item, in turn from oldest child to youngest, then reverse the order and let the youngest pick first until the items you want them to have are all chosen. If you wish to keep track on dollar amounts individuals are receiving, you can "price" things ahead of time (again with sticky notes). When the choosing is done, tally the amount each child has and see what, if anything, needs to be done to equalize shares.

Some people put off moving because they don't want to deal with dividing things among children. Don't let this stand in the way of having a new home. It need not be a bloody



Just how many sets of dishes will you really need? Will you still be doing a lot of cooking and entertaining? You may want to keep one set of dinnerware, but you may not need 12 place settings. This might be the time to start using that favorite set of china and crystal for everyday and getting as much pleasure as you can from it.

There will be vases, serving pieces, and all sorts of things you hadn't thought about in a long time. **Start labeling, sorting and making your lists right away, because that moving day will be here before you know it!** After reviewing these miscellaneous items, add the extras to your "sell" or "donation" stacks.





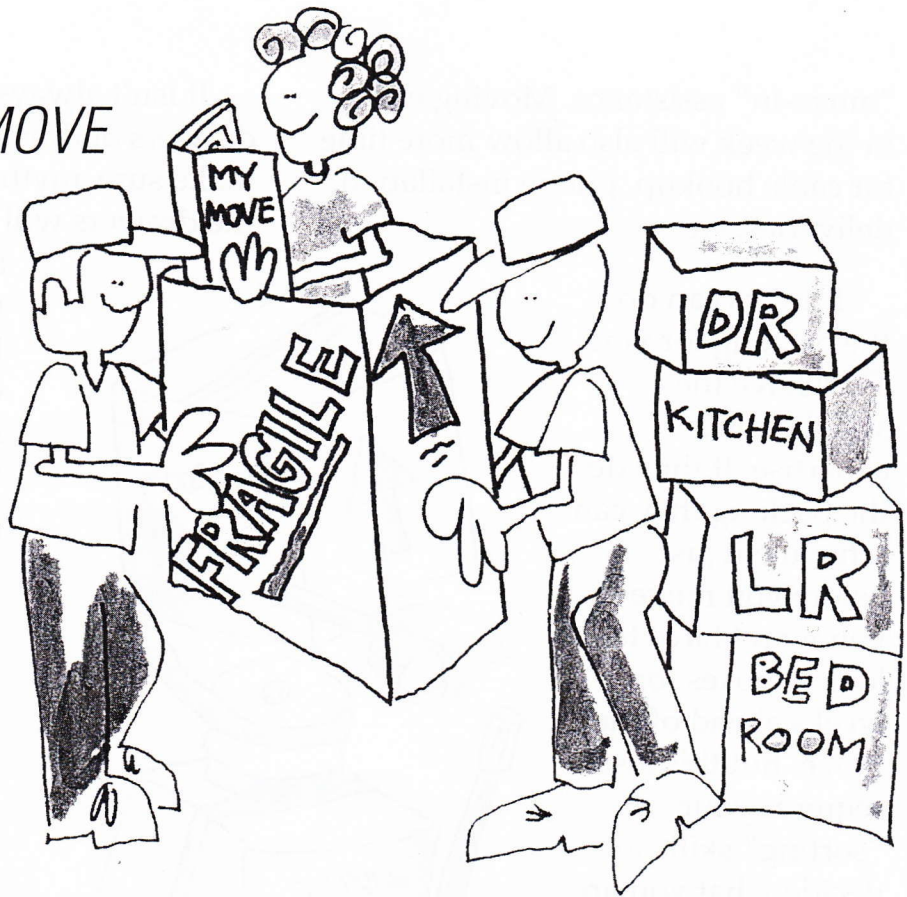
## MAKING THE MOVE

If you are in an apartment, you will need to give notice. If you have a house or condo to sell, contact a real estate agent. Ask your friends to recommend someone or look in the Yellow Pages. Check "for sale" signs in your neighborhood to see who knows your area and call them.

Once you make the decision to move and have another place lined up, the ball starts rolling. The Post Office provides a booklet that is very useful. It has mail forwarding information, change-of-address forms and a timetable of things that need to be done before your move.

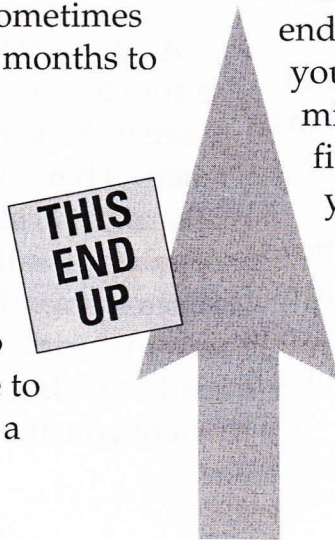
Notify magazine subscriptions of your change of address as soon as you have a moving date. It sometimes takes publishers several months to adjust their records.

Put all of the information related to your move together in a binder, large brown envelope or folder. Keep it in a safe place. Be sure to ask if your mover offers a discount for seniors.



Contact a mover. Ask your friends/family for recommendations or check in the Yellow Pages. Ask the staff where you are moving if they have movers they would recommend. It is best to set this up at least a month in advance. Weekday moving usually costs less than weekends.

Movers are generally busier at the end of the month, so try to schedule your move for the beginning or middle of the month. Try to be the first move of the day to give yourself more time to get unpacked. If possible, move early in the week to give the place where you are moving more time to follow-up on little things that might need to be done. Many facilities have fewer staff on the weekend to help with your





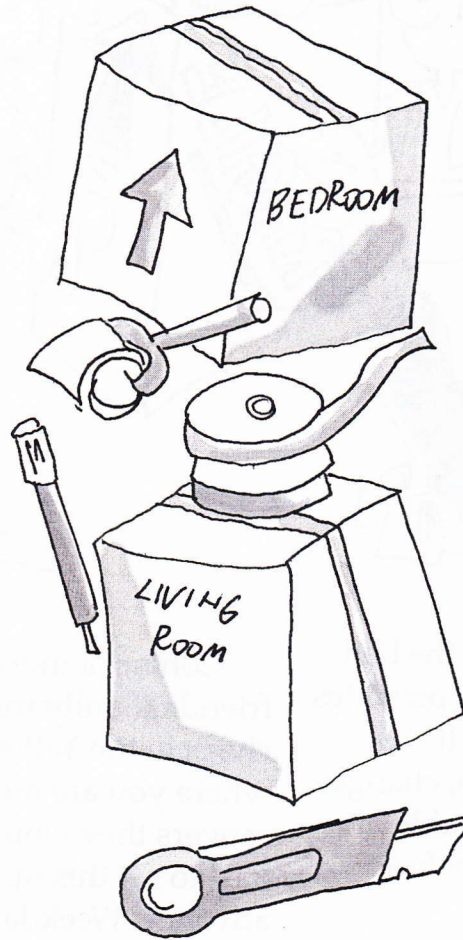
“move-in” assistance. Moving earlier in the week will also allow more time for cable hookup, phone installation, deliveries, etc.

Movers can do the packing for you. They have the supplies and expertise. If they do the packing they can schedule it just before you move so you won't have to look at boxes for weeks ahead of the move. But this also requires your “sorting” skills to decide what you are actually going to move.

Ask if your mover will provide boxes ahead of time and/or pick up and buy boxes back after your move. This could be a cost and time saving effort.

As you talk to movers and interview them about your move, find out if they have any special restrictions on items they won't/can't move (like plants, lamps, liquor, mirrors, glass tops, pictures). Are there extra charges involved for those items? Must your washer/dryer be unhooked for them to be moved? What about your computer, patio furniture, gas grill?

It isn't always necessary to empty drawers of dressers and cabinets. But make sure anything that you leave in the drawers will not break. If you have small loose items, you might want to place them in plastic bags or otherwise secure them. Movers may turn furniture pieces on end to get them in and out of your home and things may shift.



### Moving day

Are you counting on family and friends to help you move? Work with them on the schedule. Many of them will need to arrange to be off work or for child care.

If family members are taking some of your household items, make sure they know when they need to get those items before you move.

As you are scheduling your move, be sure to check with your new place to see if there are any restrictions on when/where/how you move in. Because of access to entrances, elevators, loading docks and related issues, some places only schedule one move per day within certain hours. Find out what the requirements are where you are moving.



Try to arrange good helpers so that you won't have to be there the day of the move. As long as you can have a trusted person to oversee the move-out and move-in, you are better off visiting a friend that day. Come back to your new home after things have settled a bit.

If the movers have been especially helpful, careful, or efficient and you wish to tip them, 10–15 percent of the total (in cash) is acceptable. Give the tip to team coordinator to divide among workers.

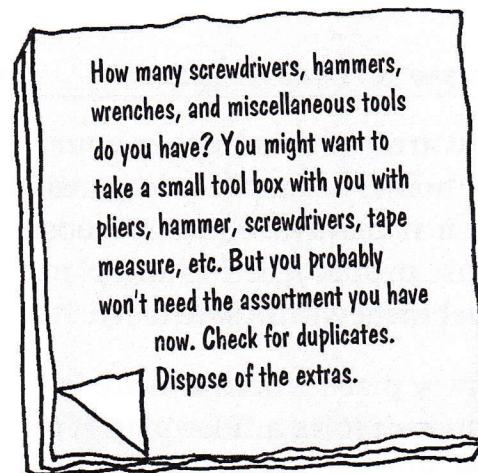
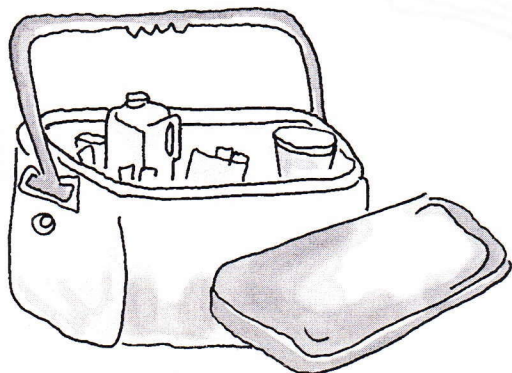
You might want to have some soft drinks, water and/or snacks on moving day. The movers will take a break and, if they get your items loaded by lunchtime, they may stop on the way to your new place for a quick meal before they unload.

## Last box

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Have a "last box" ready to hold assorted small items on the day of move. Keys to the secretary/desk, the remote control, picture hangers, odd nail, bolts, screws, anything that seems leftover as you empty the house.

Use a cooler for refrigerated/freezer items. Pack last, open first.



You want to get unpacked as quickly as possible and you might want to get extra help to do so. The day of the move the priorities are to make up the bed, and unpack the bathroom and kitchen, in that order. The more you can get unpacked with extra hands, the better. It is unsettling to face boxes that need unpacking day after day.

## After the move

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Once you have moved to your new home, if there are items left at the old place, call and arrange to have those items donated, sold, or hauled away. If a general cleaning of the old place is required, get a cleaning service to do this for you. It will be well worth the money.

Be sure to find out the restrictions for disposing of hazardous material that you might have stored in your home/garage (paint, antifreeze, cleaning supplies, mineral spirits, etc.).

## Your new floor plan

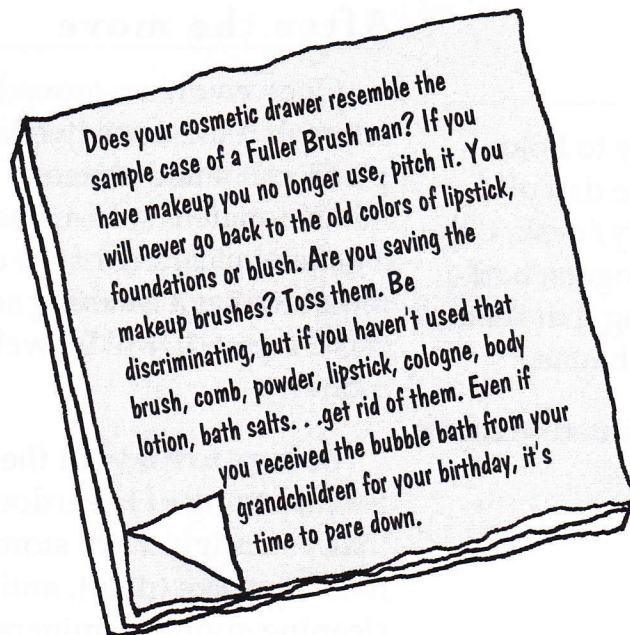
**A**s you arrange furniture in your new home, keep safety features in mind. Clear pathways, eliminate loose rugs, ensure proper lighting and place items in cabinets within safe reach.

If the new place where you are moving doesn't have a floor plan for you to use, you can make your own. (See graph paper and cut-out furniture on page 55.) If you want to enlarge this page, take to a copy/print shop in your neighborhood. Be sure to increase the furniture pieces too.

## Say "NO" to storage

As tempting as it may seem to rent a storage place in which to put those "leftover" items and things you just don't want to decide on right now, **DON'T**. There are several reasons *not* to store.

- Things you store frequently aren't worth the monthly fees you will pay for keeping them.
- The longer items are left in storage, the less likely you will even remember what they are and why you kept them in the first place.
- And you don't need the thought of "that storage place" hanging over your head.



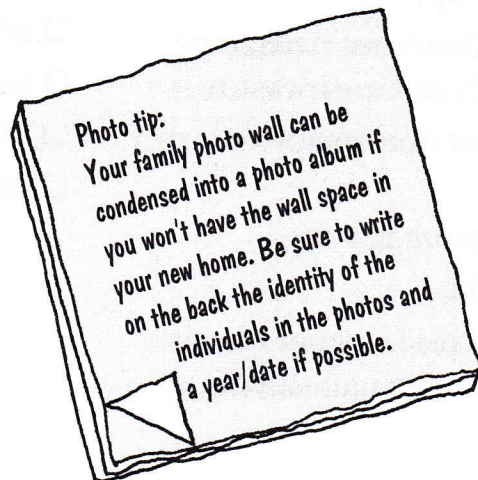


## Services checklist

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**L**eaving where you are means notifying these people of your pending move. For some you will be transferring services, for others cancelling.

Service	Date to end/change service	Date completed
gas/electric		
water		
phone		
long distance carrier		
cable		
insurance carrier		
yard service		
trash removal		
laundry service		
newspaper carrier		
house cleaning		
security system		



## Tips after you've set the moving date

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Once you know where (and when) you are going, have pre-printed address labels made. Some "quick printers" can make labels for you while you wait. These will make it easier to let people know your new address.

Make a list of your physicians, dentist, friends, bank, hair dresser, church office, attorney, accountant, credit card companies and others to let them know you're making a move. Tell them the effective date and give them your new address and phone number, if possible. The post office has change-of-address forms you may use.

If you are moving away from your neighborhood, be sure to get copies of

your personal records to use with your new doctors, lawyers and other providers. Ask them for referrals where possible.

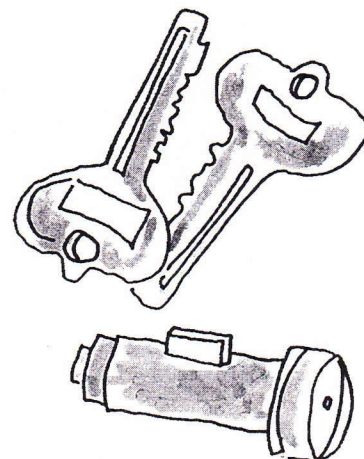
When you send your holiday greetings next year, do yours early so friends with whom you have only yearly contact will have your new address before they send their cards. Depending on the time of year, you might want to send a "I have a new address" notice to friends and relatives.

Moving companies have counselors who can work with you, offering many suggestions/tips on making a successful move.

### Have a survival kit for day of the move:

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- keys to new home
- medicines
- bottled water
- checkbook (to pay movers)
- cash to tip movers
- bathroom basics (towel, toilet paper, soap)
- tool kit (hammer, nails, tape, screwdriver, tape measure, )
- box cutter or scissors to open boxes
- plastic garbage bags
- lightbulbs
- kitchen basics (paper towels, plates, plastic utensils, cups, )
- cleaning basics (sponge, cleansers, liquid soap, dust rag, etc.)
- pen/pencil
- clock
- flashlight
- extra eyeglasses
- address book
- telephone
- change of clothes
- other (list)

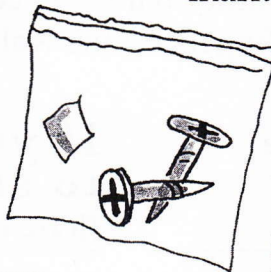
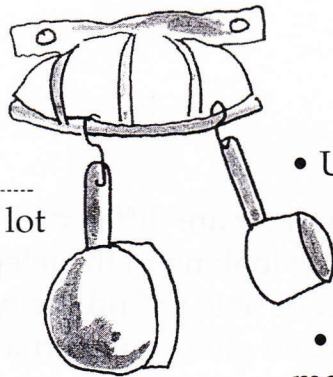




## Moving suggestions

If you are planning to do a lot of the move yourself, here are some other suggestions that might be useful:

- You can get good boxes (new or used) from truck rental companies and movers.
- Use more medium sized boxes than large ones (easier to move, fill, unpack).
- Use towels and other linens you are going to take as packing material.
- Truck rental businesses and movers have "wrapping paper" (unprinted newspaper). This is good for packing dishes and other items and is much cleaner than newspaper.
- For very fragile items, use bubble wrap and packing peanuts. Gift shops might save a plastic bag of these for you, or check with local mailing companies. Some truck rental companies and movers also have these.
- Use extra tape on the bottom of boxes to reinforce them.
- Pack like items together (heavy items in small boxes, lighter items in larger boxes).
- Mark boxes with numbers and indicate rooms where they go.
- Keep a master list of the boxes and their contents, as well as to which room they belong.
- Indicate with markers boxes that contain "fragile" items.



- Use zip top plastic bags to hold small items (parts of a lamp, for example, then tape to the lamp).
- Have duct tape, scissors, and markers ready as you pack and unpack.
- Pack one or two boxes and mark "pack last/open first." It would have bed linens, bath items, clothes for the first few days, coffee pot/coffee mugs, pan, one or two place settings of flatware and dishes, flashlight, radio, clock, remote control, snacks, etc. This should hold you over till you get all your boxes unpacked.
- Put checklists and inventories on clipboards. Stay near the door and check inventory as boxes are loaded and unloaded. This might be a good job for a family member or eager friend.
- On moving day, park your car and those of helpers out of the garage, off the driveway, and out of the way of the movers.
- You want to try to handle an item ONE TIME. Look at it, decide what should be done with it—keep, family, sell, donate, throw away—and then mark it. If possible stack/place it with other things that are going to the same place.
- Be sure to leave the garage door opener at your home for new tenants.

## RESOURCES

Services provided in each community are different. The same services may have different names or titles. By looking in the telephone directory under some of these headings, you should be able to find the types of services available in your area. Some of the headings will give you alternate places to find similar listings. You might need to be a little creative in coming up with the listings you need, but as they say, "let your fingers do the walking" for you.

### Looking for a place to live:

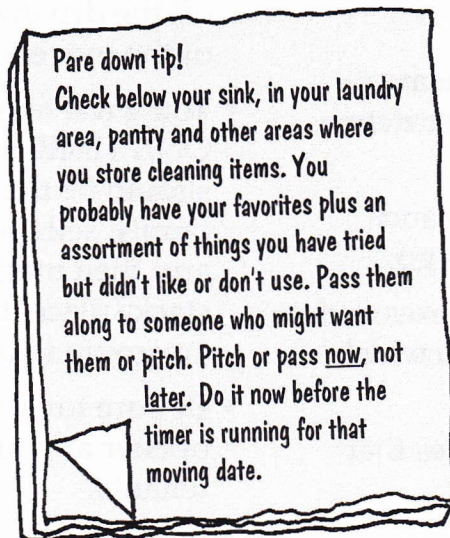
(look under these headings)

Apartments  
Assisted living  
Condominiums  
Geriatric consulting services  
Human services organizations  
Local government  
(services for seniors)  
Marriage, family,  
individual counselors  
Nursing homes  
Nursing homes referral service  
Real estate agents  
Relocation services  
Retirement & life care  
communities  
& homes  
Senior citizens' services  
Senior residences  
Social service  
organizations  
Social workers

### If you need assistance to stay where you are:

(look under these headings)

Day care centers—adult  
Geriatric consulting services  
Home health organizations  
Hospital—discharge planners  
House cleaning services  
Human service organizations  
Maintenance services  
Marriage, family,  
individual counselors  
Meal delivery services/  
Meals on Wheels  
Rehabilitation services  
Senior citizens' services  
Sitting services  
Social service  
organizations  
Social workers  
Yard/lawn services





## When you decide to move:

(look under these headings)

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Movers (residential)  
Moving services—labor & material  
Moving supplies  
Packaging services  
Pianos & organ moving  
Shipping—packages, supplies  
Truck rental  
Unpacking services

## What to do with your treasures:

(places to look if you want to sell or donate items)

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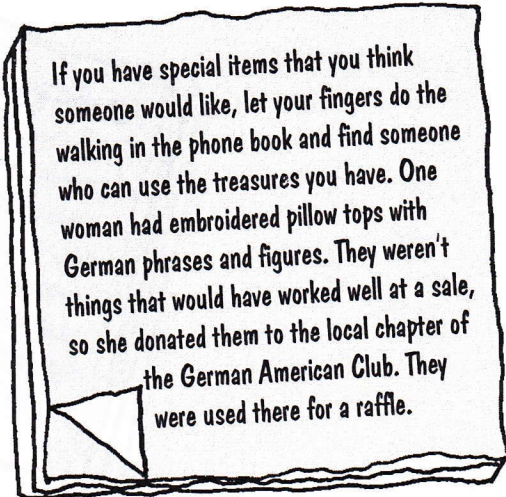
Antique dealers  
Appraisals  
Auctions  
Books/records/tapes (sell/donate)  
used book/record/tape places  
libraries, schools, civic clubs,  
church groups, books on specific  
subjects to organizations interested  
in same (gardening, trains, etc.)  
Books—used & rare  
Collectibles  
Collections (donate)  
children's hospital (for example:  
collection of rabbit figurines)  
school (collection of wildlife  
magazines)  
museum (collection of civil war  
memorabilia)  
historical home/site (antique  
linens/items)  
Consignment services  
Craft supplies (donate to)  
nursing homes

day care centers  
adult day care centers  
nursery schools  
church schools

Estates - appraisals & sales  
Eyeglasses, contacts (donate to)  
Eye Bank  
Funeral homes  
Lions Club  
Ophthalmologists  
Optometrists  
Prevent Blindness Association

Hearing aids (donate to)  
Hear Now  
9745 E. Hampden Ave. Suite 300  
Denver, CO 80231-4923  
(303) 695-7797  
1-800-648-HEAR  
(303) 695-4860 TTY  
March of Dimes

Jewelry buyers  
Letters, documents, photos—old  
(donate)  
college  
historical society  
museum  
university



If you have special items that you think someone would like, let your fingers do the walking in the phone book and find someone who can use the treasures you have. One woman had embroidered pillow tops with German phrases and figures. They weren't things that would have worked well at a sale, so she donated them to the local chapter of the German American Club. They were used there for a raffle.

Medical supplies/equipment (donate)

- American Cancer Society
- American Diabetes Association
- American Heart Association
- American Lung Association
- American Red Cross
- Homeless centers
- Hospice
- Local medical society
- Local hospital
- Related associations

Miscellaneous clothes/household belongings (donate)

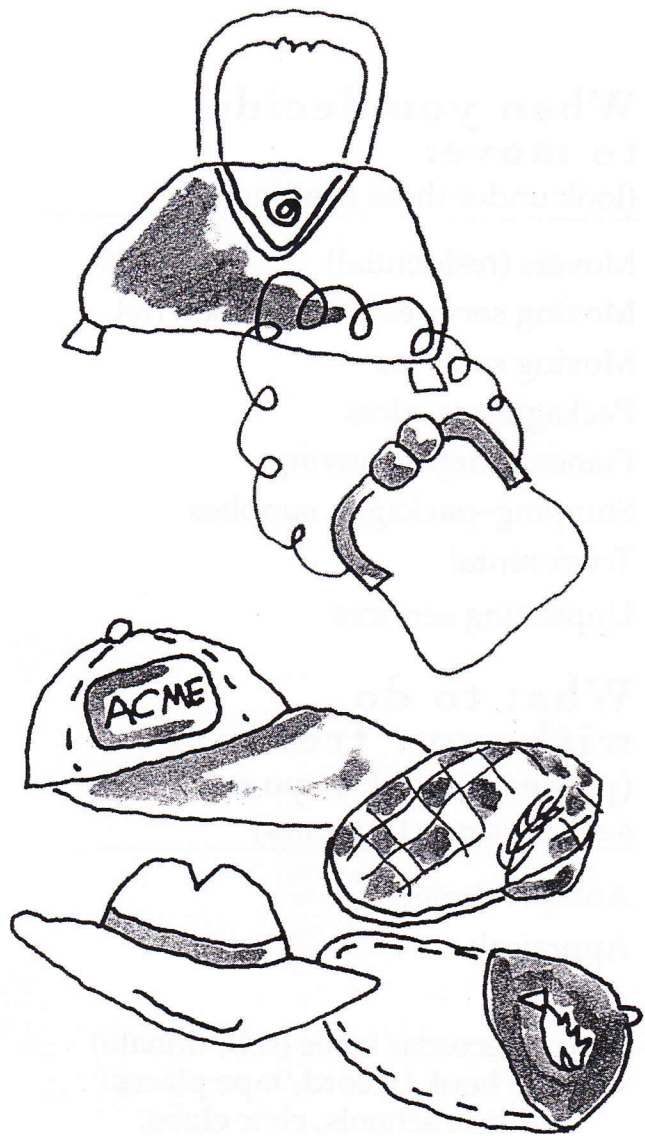
- American Council for Blind
- American Veterans
- Disabled American Veterans (DAV)
- Goodwill
- Salvation Army
- Volunteers of America

Records, tapes, & cd's

Vintage clothing (sell/donate)  
consignment shops  
drama programs in  
schools/community

Wigs, hair pieces (donate to)

- American Cancer Society
- Hospice
- Leukemia and Lymphoma Society
- Local hospital



**Purses and hats**

These are very personal items. You might have a purse for every outfit/pair of shoes. Men might have hats/caps for every occasion. It is hard to part with even one. But you might have to because of space requirements. Go through and eliminate the ones that need repair (broken clasp, strap, spot on bill, too small, etc.). Next put in a stack the ones you use most often. Add the ones you can't live without. If you still have too many to take, repeat the process.



## DEFINITIONS

**W**ith the development of more and more facilities for seniors to use when they downsize, the terms for identifying them have grown even more complex. It is important to look at the questions found earlier in this workbook to identify what you need/want. Some facilities offer a range of services so an individual can move in and be a fairly independent person but have the flexibility of moving to other areas of the same complex/campus as their needs change.

As you compare the various living arrangements, be sure to evaluate it as a long-term prospect. Look at the financing requirements. Some places require an admission fee when you move in. Is this a not-for-profit or for-profit organization, does it have financial stability, do you have to

invest money, can you or your heirs get any refund? Can you get your deposit back if you change your mind? Once you move in, are you paying month-to-month or with a large buy-in? Is any of that amount refundable if you decide to leave or need to move for medical or other reasons?

Is the facility locally owned and operated? Who is/are the responsible parties? Are there similar facilities in other communities in case you would need to move to another area of the country?

If you are selling your home and buying another, be sure to talk to your accountant/tax preparer for the tax implications. The equity you have in your home, if invested wisely, might provide the income you need to make a move.

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### **Adult Day Care**

Place for seniors to go during the day so they may either continue to stay in their own homes at night or with family members who work during the day. Meals, activities, and supervision are provided.

### **Apartment**

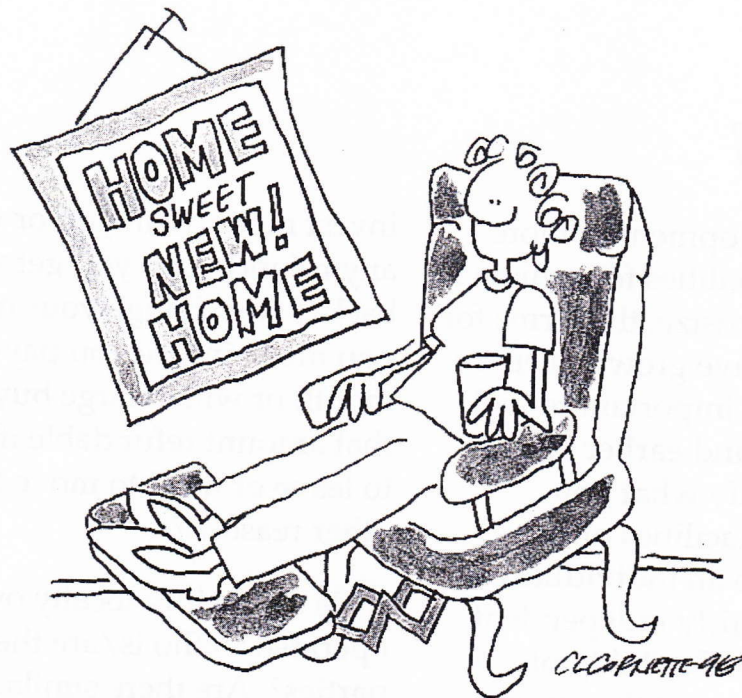
Rental property, generally paid for in monthly installments; can have all or some of utilities provided; does not offer meals or other personal services.

### **Assisted Living**

Apartment style living (mostly independent) with needed services provided such as meals, personal help, medications, housekeeping, etc.

### **Condominium**

Individual owns living unit with monthly maintenance fee to cover outside/common area maintenance. Property outside living unit is jointly owned by all condo owners in complex.



### **Group Home**

Place where seniors live with common areas (kitchen, living room, etc.) and with separate bedrooms; sharing household tasks and expenses.

### **House**

Individual owns building and property. Responsible for all maintenance and utilities.

### **Nursing Home**

Place for individuals who can no longer provide basic care for themselves. For those who need greater support for mobility, meals, medications, therapy and daily living tasks (physical and mental). Can be post-operative, rehabilitative or long-term. Recreation and crafts generally provided.

### **Retirement Community/ Seniors' Residence**

Building and/or complex where seniors reside in individual units (apartments or separate dwellings). Various arrangements are available for providing one or more meals, transportation, security, housekeeping, social activities and other amenities. Each facility has its own requirements for purchasing, renting or partial purchase (equity return).

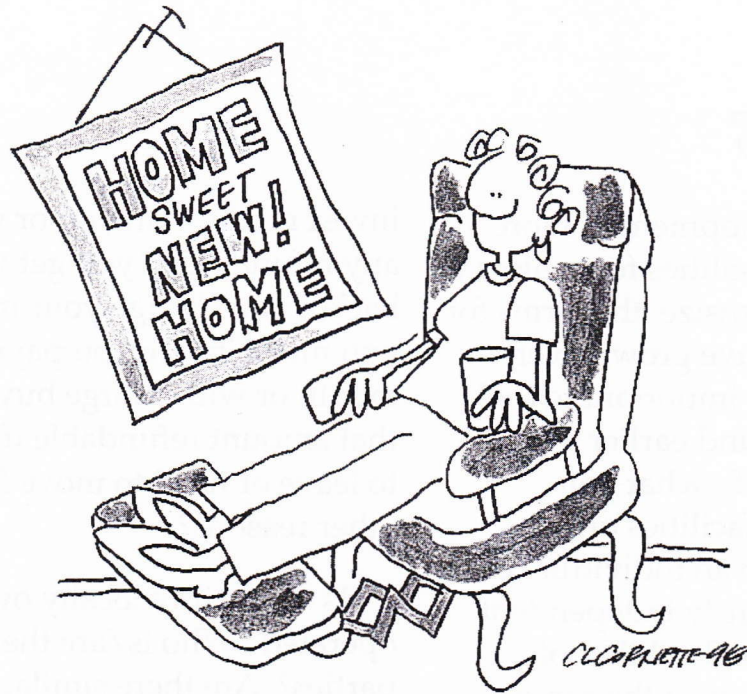
### **Retirement Housing/Community**

Individual units that can be purchased like condos but built with seniors in mind. Age requirements for moving in; some services provided but generally no meals, medical, housekeeping, transportation, or activities provided.

### **Seniors' Residence**

Units that are geared for seniors providing one or more meals, related services (housekeeping, security, etc.) and activities.





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Place where seniors live with common areas (kitchen, living room, etc.) and with separate bedrooms; sharing household tasks and expenses.

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# WHAT TO LOOK FOR?

Remove these pages

When you visit a facility to which you are considering moving, use this checklist to help you remember what to ask, what you found out and how to compare more than one place.

Choice A

Choice B

Choice C

	Choice A	Choice B	Choice C
Date			
Name			
Address			
City/zip			
Phone			
Contact			
Type:			
retirement community			
independent living			
assisted living			
nursing care			
Alzheimer's unit			
Ownership:			
local			
chain/national/regional			
Number of units			
Total number of residents			
Ratio of women to men			
Average age			
Waiting list (yes/no)			
How long?			
Type accommodation			
high-rise			
1-4 stories			
elevators			
free-standing units			
cluster units			
_____			
_____			



Choice A

Choice B

Choice C

Appearance:			
one building			
campus style			
landscaping			
neighborhood			
inviting entrance			
nicely decorated			
uncluttered			
home-like feel			
commercial feel			
nice smell			
well maintained			
Transportation:			
provided for medical			
provided for personal			
flexible			
unavailable			
Personal car:			
lot			
reserved parking			
secure parking			
covered parking			
garage			
Staff:			
pleasant attitude			
treated with respect			
Residents:			
pleasant			
appropriate dress			
Dining:			
dress code at dinner			
appealing dining room			

Choice A

Choice B

Choice C

1 meal daily (costs)			
2 meals daily (costs)			
3 meals daily (costs)			
assigned seating			
served cafeteria style			
served restaurant style			
served buffet style			
tray service (if required)			
standing meal times			
sufficient quantity served			
appetizing			
tasty			
other food options			
guest meals			
walkers allowed			
wheelchairs allowed			
separate dining for:			
assisted living			
nursing center			
Activities:			
exercise class			
indoor swimming			
outdoor swimming			
outings			
crafts			
bridge			
cards/bingo/games			
shuffleboard			
pool table			
exercise room			
tennis			
putting green			



Choice A

Choice B

Choice C

bicycling			
lectures			
music area			
library			
shop area			
computer room			
chapel			
big-screen TV (lounge)			
onsite banking			
onsite convenience store			
special events			
community events			
gardening			
special occasion functions			
Maintenance/repairs:			
provided			
extra charge			
decorating provided			
personal decorating allowed			
Arrangements (cost):			
own			
buy-in (no ownership)			
rent			
living quarters close to dining area			
studio			
studio with kitchen			
studio with sitting area			
room without kitchen			
1 bedroom with bath			
2 bedroom, 1 bath			
2 bedroom, 2 bath			

Choice A

Choice B

Choice C

deposit required			
adequate closets			
patio/deck/balcony			
storage area			
cable TV (basic)			
extra charge			
flat linens provided			
telephone			
personal laundry service			
washer/dryer in unit			
laundry room available			
housekeeping:			
weekly			
every-other week			
monthly			
bath tub only			
shower only			
bath/shower combo			
grab bars			
emergency call system			
smoke detector			
carbon monoxide detector			
sprinkler system			
security staff			
handicapped accessible			
window treatments provided			
Medical/health office			
Scheduled podiatrist visits			
Counseling services			
Staff trained in CPR and first aid			
Staff/management on site 24 hours			





# EVALUATING EXPENSES

When visiting the various facilities you are considering, decide how much you can afford.

Look at the expenses you pay each month in each of these categories. Write down your monthly income. With many of the facilities providing meals, maintenance, cable TV, property



taxes, housekeeping services, you may find the monthly expenditure to be less than you are currently paying. But be sure to put a pencil to it. You don't want to make a move only to find that after a few months/years it is more than you want or can afford to pay.

Monthly rent/mortgage/condo fee	<input type="text"/>
Utilities: water	<input type="text"/>
gas/electric (heating/air conditioning)	<input type="text"/>
basic cable TV service	<input type="text"/>
telephone (include long distance costs)	<input type="text"/>
Routine cleaning service	<input type="text"/>
Lawn/yard maintenance	<input type="text"/>
Special cleaning (window washing)	<input type="text"/>
Home upkeep (roof, furnace, gutter cleaning, etc.) average monthly amount from last five years	<input type="text"/>
Food (50%–65% of your average grocery bill)	<input type="text"/>
Property taxes	<input type="text"/>
Security system	<input type="text"/>
Insurance (homeowners)	<input type="text"/>
Other	<input type="text"/>
Total monthly expenses:	<input type="text"/>





- If you have saved **old toothbrushes** for those odd cleaning tasks. . . how many do you have? You can get by on a maximum of four. Put one near each sink and pitch the rest. (This is assuming you will still be getting new toothbrushes and having a replacement every six months or so.)
- Do you have **video tapes of programs** you have taped to watch later? *It is later.* Start a campaign to view those tapes a few at a time. Use the time when you might be watching reruns or channel surfing. Reuse the tapes from programs you don't want to save and label the ones you want to keep. (If you really want to be organized, make a list of the programs you have saved so you can find them quickly when you want to watch.) There probably are some programs you can't remember why you taped or that aren't on the tape you thought they would be! Be selective. Feel free to share special tapes with friends. (Another good tip is to give friends books, tapes, other small items and ask them to bring them to you in your new home. That way, you won't have to move them!)
- **Clothes.** What season is it now? If you are like most people, you have a few outfits that are your favorites. You feel the most comfortable in them and wear them the most often. What about all those other things taking up space in your closet? How many can you get rid of? Do they need laundering? Mending? Wrong color? Out of style? **When in doubt, throw it out.** If you didn't wear it last season, chances are you won't wear it this year either. This applies not only to hanging things but to sweaters and other chest of drawer and shelf things. You can simplify your life a lot by getting rid of the "extras."
- Do you have an accumulation of **bud vases and flower containers**? Many churches and nursing homes can put them to good use. Get the ones you won't need (all but a couple for your use) and call around to see who might like to have your leftovers.

# CHECKLIST FOR MOVING

## BEFORE YOU LEAVE:

### ADDRESS CHANGE

- Post Office: Give Forwarding Address.
- Charge Accounts, Credit Cards.
- Subscriptions: Notice requires several weeks.
- Friends and Relatives.

### BANK

- Transfer funds, arrange check-cashing in new city.
- Arrange credit references.

### INSURANCE

- Notify company of new location for coverages: Life, Health, Fire & Auto.

### UTILITY COMPANIES

- Gas, light, water, telephone, fuel, garbage.
- Get refunds on any deposits made.

### DELIVERY SERVICE

- Laundry, newspaper, changeover of services.

### MEDICAL, DENTAL, PRESCRIPTION HISTORIES

- Ask Doctor and Dentist for referrals; transfer needed prescriptions, eyeglasses, X-rays. Obtain birth records, medical records, etc.

### PETS

- Ask about regulations for licenses, vaccinations, tags, etc.

### AND DON'T FORGET TO:

- Empty freezer; plan use of food.
- Defrost freezer and clean refrigerator. Place charcoal to dispel odors.
- Have appliances serviced for moving.
- Remember arrangements for TV and antenna.
- Clean rugs or clothing before moving; have them moving-wrapped.
- Check with your Moving Counselor; insurance coverage, packing and unpacking labor, arrival day, various shipping papers, methods and time of expected payment.
- Plan for special care needs of infants and pets.

## AND ON MOVING DAY:

- Carry enough cash or travelers checks to cover cost of moving services and expenses until you make banking connections in new city.
- Carry jewelry and documents yourself; or use registered mail.
- Plan for transporting of pets; they are poor traveling companions if unhappy.
- Carry travelers checks for quick, available funds.
- Let close friends or relatives know route and schedule you will travel including overnight stops; use him or her as a message headquarters.
- Double check closets, drawers, shelves to be sure they are empty.
- Leave all old keys needed by new tenant or owner with Realtor or owner.

## AND AT YOUR NEW ADDRESS:

- Obtain certified check or cashiers check necessary for closing Real Estate Transaction.
- Check on service of telephone, gas, electricity, water and garbage.
- Check pilot light on stove, hot water heater, and furnace.
- Have appliances checked.
- Ask Mailman for mail he may be holding for your arrival.
- Have new address recorded on driver's license.
- Visit city offices and register for voting.
- Register car within five days after arrival in state or a penalty may have to be paid when getting new license plates.
- Obtain inspection sticker and transfer motor club membership.
- Apply for state driver's license.
- Register family in your new place of worship.
- Register children in school.
- Arrange for medical services: Doctor, Dentist, Veterinarian, etc.

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## NOTES:



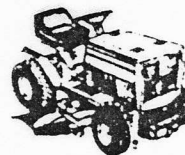
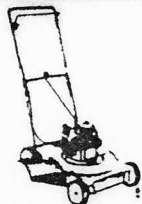
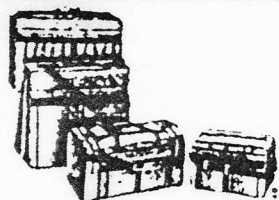
# MOVING TIPS

## **BEFORE YOU LEAVE YOUR PRESENT ADDRESS:**

1. Reading of: gas meter - electric meter - water meter.
2. Cancel: telephone - utilities - newspaper delivery.
3. Have your refrigerator and other appliances serviced for the trip.
4. Call the utility company in the city to which you are moving. Ask them about necessary fees for deposits required for the installation of services.
5. Remit the utility deposits required, with information when and where you will want the following services: cable, water, electric, and telephone.
6. Send your forwarding address to your local post office and send change of address cards to magazines, insurance companies, friends and department stores.
7. Transfer your insurance on household goods or other insurance on personal possessions, so that they will be covered at your new home and en route.
8. Notify the principal of your children's school about your intended move. Get a letter from him covering the status of your children in school.
9. Notify the Pastor of your church that you are leaving.
10. Obtain birth records and baptism records of all the children.
11. Get medical and dental records, eyeglass prescriptions, etc.
12. Have your present bank arrange credit references for establishing new accounts in the city to which you are moving.
13. Arrange for sufficient cash or travelers checks to cover the cost of moving services and expenses until you make banking connections in the city to which you are moving. Cash or certified checks are generally required by transfer companies.
14. Leave the keys for your old property with the realtor or neighbors.

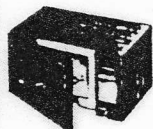
## **AT YOUR NEW ADDRESS:**

1. Obtain certified check or cashier's check necessary for closing the real estate transaction.
2. Check on services of telephone - cable - electricity - water.
3. Ask the mailman for mail he may be holding for your arrival.
4. Obtain new driver's license.
5. Visit city offices and register for voting.
6. Register your car after arrival in state or a penalty may have to be paid when getting new license plates.



# TIME FOR A CHANGE?

Too Much Clutter?  
Downsizing?  
Moving?  
Overwhelmed?



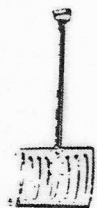
## Wondering what to do next?

Call the downsizing experts at **NEW DAWNINGS**



### We will:

Sell/ Buy Antiques, Artwork, Jewelry and other  
valuables.



Conduct a household sale.

Provide An On-Line Auction Service

Call today-Don't delay, "HELP" is on the way!



# NEW DAWNINGS

## 585-770-3699

Serving the community for over 15 years.

Web: [NewDawnings.weebly.com](http://NewDawnings.weebly.com)

Email: [dprovan@rochester.rr.com](mailto:dprovan@rochester.rr.com)

