



Downsize and Live Large

A Guide to The Next Chapter of Your Life



To downsize or not to downsize? That is the question we may ask ourselves when we become empty nesters or retire. Talking with your Financial Advisor is always a good first step when making this important decision. He or she can help you determine if moving to a smaller residence will reduce your monthly living expenses, thus freeing up money (and time) for other pleasurable experiences.

Here are our top ten tips to downsize and de-stress your move:



1. Start Early - End Happy

It is never too early to begin the downsizing process. Give yourself plenty of time for this process, because it will inevitably take longer than you expect. Take your time, and don't try to sort through your entire house in one day or weekend.

Schedule weekly sessions with a professional or family member to help you downsize and make decisions about your belongings.

Take it **one room at a time** and take breaks throughout and start with smaller spaces such as a bedroom instead of a garage.



2. Ask for Help

Don't be too proud or independent-minded to ask for help. Moving is not easy and you shouldn't do it all yourself. But don't wait until the last minute to ask for help. Some of these downsizing steps require months to accomplish.



3. Don't Lose Touch

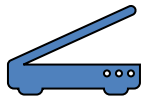
Create a list of people, places, and utilities/services that need to be notified of your upcoming change in address.



4. Get Generous

Since you can't take everything you own to your new home, now is the time to make arrangements to "gift" some of your treasures to special people in your life including, and especially family, helpful neighbors, friends, favorite organizations, or a church or synagogue.

Also **allocate space** to collect items for eBay, estate sale, auction, antique dealer, or consignment stores.



5. Save Your Memories

Digitize whatever you can. For example, photos, tax returns, CD's, DVD's. Most documents can simply be scanned to a computer and saved as a PDF file, or uploaded to the cloud using services like [DropBox](#) or [Google Drive](#).

Be aware that some DVDs and CDs are copyrighted, which may prevent you from making a copy, even though making personal copies of products you've purchased should fall under "fair use" laws.

©Copyright SolutionsForYou, Inc.
www.solutionsforyou.com
503-246-0710



6. New Looks for Books

If you own large quantities of books, you need to spend time downsizing your collections. Books occupy lots of space and are heavy to move. Consider donations to libraries or senior centers, or sales to used bookstores. Call on a book dealer for older books with potential value.



7. Use It Up - Don't Move It Out

Take an inventory of your canned goods, frozen foods, and paper products. Plan to use as many of these products as you can before moving. If you simply have too many of these items think about passing them on to a local food pantry.

Get rid of duplicates. You'll find this is especially true in your kitchen. You have two or three spatulas and ladles; a couple of oversized stock pots; four different sized cookie sheets.



8. **Recycle the Toxins**

Take time to put together a box or two of household, yard, and automotive cleaning products, as well as paint, that are considered hazardous.



9. **Gather important documents and special items to be moved by you**

Including birth certificates, passports, stock certificates, marriage license, medical information, financial documents, jewelry, cash, and any special collections of monetary or emotional value.

Paring down and carefully organizing everything can do wonders for keeping a house livable and clean. By keeping a focus on organization throughout the downsizing process, you'll end up feeling much better about your lightened up, decluttered space and you will be ready for your next chapter in life. We are here to help you through this transition.



10. **Pack a Survival Bag**

Put together a **survival bag** for move day. It might include personal needs (medications, eyeglasses, toiletries, change of clothes); kitchen needs (snacks, drinks, folding chair, disposable cups and plates); basic tools (hammer, screwdriver, flashlight, tape, etc.); cleaning supplies (sponge, roll of paper towels, soap, etc.).