



# Downsizing

## The Ultimate Downsizing Checklist Before Retiring

*By focusing on goals and priorities, you can create a new, simplified lifestyle*

As retirement approaches, many older adults consider downsizing their home as a way to simplify their lives, reduce expenses, and focus on what truly matters.

While the process can be emotionally and physically challenging, it can also be liberating and rewarding. To help you navigate this transition, we've compiled a comprehensive checklist for downsizing your home.

### Reflect on Your Goals and Priorities

Before you begin the downsizing process, take some time to reflect on your goals and priorities.

- What do you want to achieve by moving to a smaller space?
- Are you looking to reduce expenses?
- Simplify your life?
- Be closer to family and friends?

Identifying your goals will help you stay focused and make better decisions throughout the process.

### Assess Your new Living Space

Evaluate your new living space and determine how much room you'll have for your belongings. Take measurements of each room and create a floor plan to help you visualize how your furniture and other items will fit. This will also help you decide what to keep and what to let go of.

### Sort and Categorize Your Belongings

Begin the process of sorting through your possessions by categorizing them into four groups: keep, sell, donate, and discard. Be realistic about what you truly need and what can be replaced or repurposed in your new home. Remember, downsizing is about simplifying your life, so be selective about what you choose to keep.

### Enlist Help From Family and Friends

Downsizing can be an overwhelming task, so don't be afraid to ask for help. Enlist the assistance of family members, friends, or even professional organizers to help you sort through your belongings and make decisions about what to keep and what to let go.

### Sell, Donate, or Discard Unwanted Items

Once you've decided what items you no longer need, start the process of selling, donating, or discarding them. Hold a garage sale, list items for sale online, or donate them to local charities. Be sure to dispose of any hazardous materials, such as paint or chemicals, according to local regulations.

### Start Packing Early

Begin packing well in advance of your move to help reduce stress and make the process more manageable. Start with items you rarely use or seasonal belongings, and work your way through your home. Label boxes clearly with their contents and the room they belong in to make unpacking easier.

## **Notify Important Contacts of Your Move**

Inform your bank, insurance company, healthcare providers, and other important contacts of your upcoming move and provide them with your new address. Don't forget to update your address with the post office to ensure your mail is forwarded to your new home.

## **Hire a Reputable Moving Company**

Research and hire a reputable moving company to help make your transition to a smaller home as smooth as possible. Be sure to get estimates from multiple companies and check their references before making a decision.

## **Unpack and Organize Your New Home**

As you unpack and organize your new home, take the opportunity to create a space that supports your new, simplified lifestyle. Focus on functionality and comfort, and avoid the temptation to fill your new space with unnecessary items.

## **Embrace Your New, Downsized Life**

Finally, remember that downsizing is not just about moving to a smaller space; it's also about embracing a new phase of your life. Enjoy the freedom that comes with having fewer possessions and the opportunities that your simplified lifestyle affords you.

## **Remember, Planning Matters**

Downsizing your home can be a challenging but ultimately rewarding experience for older adults approaching retirement.

By following this checklist and focusing on your goals and priorities, you can successfully navigate the process and begin enjoying your new, simplified life.