



## Guide to Rightsizing for Seniors



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# The Ultimate Checklist to Rightsizing in Later Life

## Plus 10 Bonus Tips to Make the Move Easy!

Throughout our lives, we are constantly rightsizing – from a room in our parent’s home, to a college dorm or first apartment, to the home where we raise our children, to the places where we retire. It’s all about having the right spaces, comforts, and belongings that we need at each phase of our lives.

In later life, many choose to move to smaller homes or apartments, and eventually to assisted living communities. Rightsizing in later life is an opportunity to live with:

- Just the right amount of space
- Less to clean and maintain
- A community of your peers
- Help with daily chores and activities
- A space to curate and cherish your favorite, most treasured belongings

It’s efficient living at its finest.

But, even if you’re looking forward to rightsizing, moving out of a home you’ve lived in for many years can be a stressful time, between sorting through belongings, packing, scheduling movers, and setting up your new home.

Not to mention that moving into a smaller space means making decisions about what you’ll keep and what you’ll won’t. With all this, you might just believe staying put is a better option!

But, it doesn’t have to be that way.

To keep organized along the way, print out **The Ultimate Checklist to Rightsizing in Later Life**, and start making your way down the list. It’ll help keep you organized and on-track for your upcoming move.

Also, be sure to read our **10 Bonus Tips to Make the Move Easy** as you get started on your rightsizing journey.







## Ten Bonus Tips to Make the Move Easy

### 1. Ask for Help

Enlist family members or close friends early on to help you. Moving isn't an easy process, but you don't need to do it all yourself.

Who would be good to invite to visit your new space with you? Who is a good planner who can help keep you on track? Who can be there to help sort and pack your belongings?

### 2. Get Familiar with Your New Space

If you're moving into a senior living community, spend some time with loved ones in your new apartment or cottage home and visualize your favorite possessions around you.

Where will you put them? What won't be necessary anymore? Then, when you return to your house, it will be easier to visualize where each item will or won't fit in your new home as you're organizing.

### 3. Make a plan

Time to get out the calendar and set dates for those productive days.

What do you want to accomplish each day between now and moving day?  
Which friends or family members can help you on that day?





# Ten Bonus Tips to Make the Move Easy

## 4. Create To-Do Lists

Lists help keep you organized! **The Ultimate Checklist to Rightsizing in Later Life** is a great start, but you'll also need to make lists that are specific to you, such as lists of belongings you would like to keep, donate or sell.

## 5. Sort Unsentimental Items First

It's smart to start with things that are easy to part with. You'll find it easier to begin clearing out clutter and things you've accumulated over the years if you begin the process with items that have little to no sentimental value.

For some people, starting with clothing is a good place. For others, the bathroom or kitchen may be right. Think about what feels the most easeful and start there.

## 6. Choose the Useful and Joyful

Many people look at their belongings and think they should keep it all, except items that are obviously useless, worn, or redundant.

But it can be useful to think about it in the opposite way – consider that you could get rid of it all, except the items that are useful, beautiful, or make you happy.

Take the advice of Marie Kondo, author of *The Life-Changing Magic of Tidying Up: The Japanese Art of Decluttering and Organizing*, who advises you to pick up each item and ask yourself, “Does this spark joy”? If it does, keep it.

## 7. Unsure? Don't Get Rid of It (Yet)

If you're unsure about some items, you don't need to throw them away just yet.

Set them aside, preferably out of sight, and see how you get along without them. You could be surprised at how little you notice they're gone — and how much you enjoy living with less stuff.



# Ten Bonus Tips to Make the Move Easy

## 8. Save Things with Meaning

After you've gone through everything that's not sentimental, you'll have your most prized possessions left. Not it's time to go through these sentimental items and decide what you want to take with you and what you want to pass on to family.

Pro tip: Give yourself and your helpers lots of time to sort through these items. Reminiscing over them can be one of the most meaningful parts of rightsizing. Don't rush this part of the project, as it could lead to some fun time with your family and friends.

## 9. Create a “First Day” Suitcase and Box

When you begin packing, pack a suitcase with items you'll need within the first day, including clothing, pajamas, toiletries, and prescriptions.

You'll also want a “first day” box with a set of sheets, towels, and any basic tools, cleaning supplies, or kitchen supplies you might immediately need.

This will ensure you have everything you might need ready to go your first night in your new home. And, it means you can unpack your other belongings slowly and at your leisure.

## 10. Celebrate the New Journey

Rightsizing is a chance to celebrate the items that really matter to you while saying goodbye to those that have run their course. Involve your friends, family and loved ones as much as you can, and pour a glass of wine if it suits you. Cheers to this next step in your life!





# The Ultimate Checklist to Rightsizing in Later Life

## Planning

- ☐ Enlist family and friends to help you along the way
- ☐ Visit your new home and take notes and photos of the size and space
- ☐ Start a preliminary list of all essentials needed, things you know you don't want, etc.
- ☐ Set the date(s) for packing and cleaning
- ☐ Set move date
- ☐ Hire the help and make a list of jobs for them

## *Help:*

- ☐ Family members
- ☐ Friends
- ☐ Professional movers
- ☐ Organizers
- ☐ Cleaners

## *Jobs:*

- ☐ Organizing items into keep and give away boxes
- ☐ Purchasing boxes and containers, if needed
- ☐ Scheduling moving date(s)
- ☐ Cleaning each room
- ☐ Switching bills and important accounts over to new address
- ☐ Making move-in arrangements

## *Selling the home?*

- ☐ Choose a listing agent
- ☐ Determine home's value and begin the listing process
- ☐ Prepare your home for sale (cleaning and minor repairs)



# The Ultimate Checklist to Rightsizing in Later Life

## Sorting

- ☐ Start by removing the large pieces of furniture and separate by what you want and what you don't want
- ☐ Go room-by-room and start removing things that you know you don't want (but don't throw them away just yet!)

### *Things to sort through:*

- |                                       |   |   |
|---------------------------------------|---|---|
| <input type="checkbox"/> Furniture    | <input type="checkbox"/> Media (VHS, DVDs, CDs)     | <input type="checkbox"/> Recreational items   |
| <input type="checkbox"/> Clothes      | <input type="checkbox"/> Medicines                  | <input type="checkbox"/> Seasonal decorations |
| <input type="checkbox"/> Accessories  | <input type="checkbox"/> Tools                      | <input type="checkbox"/> Emergency supplies   |
| <input type="checkbox"/> Books        | <input type="checkbox"/> Hobbies and collectibles   | <input type="checkbox"/> Kitchen supplies     |
| <input type="checkbox"/> Files/papers | <input type="checkbox"/> Linen, bedding, and towels | <input type="checkbox"/> Cleaning supplies    |
|                                       |   | <input type="checkbox"/> Sentimental items    |

- ☐ Set things aside from each room that you know you will need immediately and put them in a “first day” box

### *Items to pack:*

- |  |  |
|--|--|
| <input type="checkbox"/> Medical supplies    | <input type="checkbox"/> Entertainment items (books, movies, etc.) |
| <input type="checkbox"/> Personal care items | <input type="checkbox"/> Cooking supplies                          |
| <input type="checkbox"/> Clothes             | <input type="checkbox"/> Cleaning supplies                         |

- ☐ Go through your sentimental items and sort them by “take with me” and “give to family members”



# The Ultimate Checklist to Rightsizing in Later Life

## Clearing

- ☐ Remove unwanted items from home

### *How to get rid of items:*

- ☐ Antique Stores
- ☐ Resale Stores
- ☐ Donation to Causes
- ☐ Yard Sales
- ☐ Give to Family Members

## Packing

- ☐ Clean all items you want to take with you.
- ☐ Organize items by which room in the new house you'll want to unpack them in.
- ☐ Label each box with the name of its room in the new house. Also, for each room, give each box a number. During move-in day, you'll know whether all boxes have made it to the right place.
- ☐ Schedule the date and time for the moving company to come pick up your things.

## Moving

- ☐ Call ahead and make sure you have easy access to your new home.
- ☐ Assign friends and family specific rooms that they are responsible for on moving day.
- ☐ Have the moving team place boxes into moving vehicles in the order that you want them to be unpacked at your new home.
- ☐ As the moving team unloads boxes and places them into each room, double check your count of boxes you made during the packing phase.
- ☐ Have your help move things into place while you supervise so you can see where you want things to go.



# The Ultimate Checklist to Rightsizing in Later Life

## Settling In

- ☐ Start by unpacking your “first day” suitcase and box.
- ☐ From there, unpack the most important items first; everything else can wait.
- ☐ Change address on important personal and financial things:
  - ☐ Financial Documents
  - ☐ Legal Information
  - ☐ Entertainment Subscriptions







Ready to start looking for your new home? Visit us online  
at *GrandOaksDC.org/Visit* to schedule a tour today.