

Scaling Down Almost Painlessly

Moving to a smaller house or apartment in a retirement community almost always involves a certain degree of trauma, both for the elder who's moving and for family members. However, by planning ahead you can reduce the discomfort involved and turn what might well become a nightmare into a pleasant event.

Begin by Planning for the Move

Where is the elder moving? Go to the actual house or apartment with tape measure, pad and pencil and write down measurements. Floor space is important, but don't forget about ceilings. Many elders own large pieces of furniture that may not fit into rooms with low ceilings. Your work here will determine which pieces can move with your elder.

And while you're at the actual location, talk to several other elders who already live there. What is their life style? Do they go outside the property on frequent trips? How do they dress? Casual lifestyles will require an entirely different style of dress than more formal ones.

Gather Supplies and Contact Helpers

Having all the supplies you will need in one place will speed your task. You'll want a number of storage bins; five or six should be sufficient to hold sorted items. Plastic bags can be used for discarded belongings and as a container for articles to be donated to charities. Packing boxes and supplies such as padding materials and wide sealing tape are must-haves. Labels and dark marking pens are essential to ensure that boxes go to their intended location.

While you're in the gathering stage, begin to contact helpers you'll need. Among these may be:

- estate sale professionals
- certified appraisers
- moving companies
- house cleaners
- repair specialists (electricians, plumbers, carpenters, painters)

Ask friends, relatives, and senior real estate specialists for recommendations. Also, check with the Better Business Bureau to ascertain whether problems have been reported about particular companies or individuals.

Approach Your Task One Room at a Time

Who should help? The elder and one family member should assume responsibility for sorting all items and some packing. Do not include everyone in the family if you want to make the job quick and easy because distractions increase in geometric proportion to the number of persons doing the sorting.

Sort all the items in one single room at once, beginning and ending in the kitchen. Why start there? Because kitchens in small houses and apartments typically are short on storage space, and the elder needs time and experience to determine which items are true necessities, and which may never be used. If you reduce kitchen items to a bare minimum at the beginning, your elder can determine what's needed and what's not by living with them ahead of time. After living with fewer items, your elder may find that items once thought essential may not be needed. Complete work in the kitchen at the very end of your tasks.

Even though you intend to stay in only one room, distractions will occur. Resist them by stacking items that belong in another room at the door. A bin or box placed just inside the door can contain all the items that have homes elsewhere.

Make your motto One Thing at a Time; One Time for each Thing. Once you've picked up an item, decide then and there what its fate should be. Place it in one of the bins you've labeled:

- Discards
- Donations
- Distribution to Relatives
- Keepers
- Uncertainties

Large collections of books may require their own bins. You might have bins for Collectors' editions, books to be stored and books to be sold to book dealers, etc. When you have finished categorizing all the items in the room, start the packing process. Items in the Uncertainties bin can be packed for storage. If an unbreakable item is to be moved only a short distance, don't waste time on elaborate packing and padding. Items like crystal and china, however, require excellent packing, regardless of the distance they will be moved. If you can't do a great job, leave packing fragile items to professionals.

Mark boxes as you go.

Nothing is more frustrating than finding that you've shipped your elder's bed linens to Aunt Minnie and kept a silver salver you meant to send your nephew.

Don't try to do everything at once. Do only one room on any given day, and take the time to enjoy reminiscing as you sort items.

This is also the perfect time to have a certified appraiser come in to appraise items that may be of significant value. Very expensive items may be auctioned at an auction house such as Christy's or Sotheby's. Less expensive items can be sold to local antiques dealers. By having an idea of their value before going to dealers, you reduce the chance that dealers can scam you. You could also consider selling items through an on-line auction. If you do so, remember that you will be responsible for shipping items and ensuring their condition to successful bidders.

Distribute Items to the Intended Recipients

Schedule a single day for distribution of items. In-town relatives can come to pick up items intended for them; they may also be helpful by taking bags to charities, books to resellers, boxes to storage, and trash to dumps.

Use this day for shipping as well. Small items can be shipped via UPS or FedEx; large pieces of furniture and antiques may require special handling by movers. Once you've finished distribution, you should have a considerably reduced pile of boxes and furniture. These boxes should contain only items to be moved to the elder's new residence or to storage. Remaining items should be those to be sold in an estate sale.

Move the Elder to His New Residence

Will the mover actually show up on time? Will the mover actually show up at all? Increase the probability of a good outcome for the move by contacting the mover to confirm arrangement a week ahead and the day before the actual move is scheduled. Of course, missed appointments may still occur, but if you've checked out the company with the Better Business Bureau and reminded the company of your appointment, the chances are good that the move will go as planned.

Accompany your elder to his new residence and help him with the moving-in process. Even if not all boxes can be emptied in a single day, he will feel more comfortable if a few items that are meaningful to him are unpacked and placed where he can find them.

Hold an Estate Sale

Once the movers have left the premises, the estate sale professionals should come in to evaluate and price items for the estate sale. Give them a key to the house, and then get out of their way. If you have chosen well, these professionals can do a great job of pricing items to sell and clearing the house of whatever remains. They will take a percentage of the sale receipts as compensation. The days of the sale are good days to keep your elder busy elsewhere. A tearful elder does nothing to help sales.

Schedule a professional cleaning service to clean the house once the estate sale is over. When that has been completed to your satisfaction, turn the keys over to your senior real estate professional and give yourself a big pat on the back. You're done!

Written by Phyllis Staff

