









# Downsizing CHECKLIST

## STEP 1. START WITH A PLAN

-  Choose your ideal move date
-  Create a timeline with key tasks
-  Decide who's involved (family, movers, real estate agent, etc.)
-  Schedule a consultation with a downsizing expert

## STEP 2. SORT WITH PURPOSE

-  Go room by room and label items: Keep/Donate/Sell/Toss
-  Start with low-emotion areas (laundry room, pantry)
-  Use the One-Box Rule: Fill one box only with things you truly want in your next home
-  Create an "Undecided" box - revisit within 7 days

## Expert Tips



Take photos of sentimental items before letting them go



Keep a running to-do list in a notebook or app



Give yourself breaks — this is emotional work



Celebrate your progress. Every step forward matters.

# DOWNSIZING CHECKLIST

## STEP 3. DE-CLUTTER & LET GO

- ✓ Donate items in good condition to local charities
- ✓ Host an estate sale or garage sale (or get help from a pro)
- ✓ Recycle or dispose of outdated or damaged items
- ✓ Let go of “guilt items” (gifts you never used, family heirlooms you don’t want to keep)

## STEP 4. ORGANIZE YOUR MOVE

- ✓ Sort paperwork, keep what you need for the move
- ✓ Pack out-of-season items first- then your must haves
- ✓ Create “Open First” and “Handle With Care” boxes
- ✓ Work with a trusted mover or packing professional



### Strategies For Success

- ✓ Pack an “Essentials Box” (meds, documents, coffee, first-night items) niture layout accordingly
- ✓ Keep important papers, medication, and valuables with you
- ✓ Measure large items to determine fit before deciding what to keep
- ✓ Divide your floor plan into zones and plan furniture layout accordingly



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**Still Have Questions?  
Contact Us for Support**

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