



The Guide to Worry-Free Downsizing

Plan, Prepare, Perform



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Introduction

The time has come for you to consider making a change to your living situation by moving to a home more accommodating to your needs. It may be one of life's biggest transitions for you.

We put together this short guide to give you a logical approach to take to get you from where you are to where you want to be.

It's easy to get overwhelmed when packing up your home and planning out a future with less living space. Dealing with all of "the stuff" is where the heavy lifting factors in with multiple things to coordinate all at once. The entire process runs much smoother with a well thought out strategic downsizing plan.

Follow this guide to take the worry and uncertainty out of the situation.

First Things First

We've all heard the saying, "failing to plan is planning to fail."

It's happened enough times in our lifetime to understand that making a move requires a good plan to go smoothly.

It is the starting point for anyone considering downsizing to a more manageable living situation.

Plan ahead: Start planning for downsizing as early as possible. This will give you ample time to research your options and make informed decisions.

One exercise that we find beneficial when planning out a move is to create a Downsizing Worksheet by drawing 3 columns on a page, creating a spreadsheet, or using the Worksheet we've provided at the end of this guide.

The first column is titled "Needs." Start with your desired monthly budget for living expenses, then list important factors such as:

- Type of living arrangement (single floor living, location, rent vs buy, a smaller home, retirement community, etc.)
- Location (proximity to family/friends, amenities, healthcare services, and transportation)
- Size (smaller and more manageable is typically a goal when downsizing)
- Amenities (list what is important to you like a laundry room, storage, or maybe a garden)
- Safety (list specific requirements)
- Personal belongings (consider what things are absolutely necessary for you to live on a regular basis)
- Help & Resources (list the people you have available to help and what professional services may be necessary to lighten the load when downsizing)
- Timing (identify when do you need to be in your new home, what time of year will you be making the move, and how much time will it take to prepare and execute everything to get there)

The second column is titled "Wants." Revisit the list above and visualize the ideal scenario you would like to see become a reality. It is important to have your ideal vision written down so you can refer to it as you develop your plan and assign your living and moving budgets accordingly.

You may be pleasantly surprised at the fact that getting what you want is more feasible than you originally thought. On the other hand, it may be the case where you'll need to adjust your vision to better align with your needs and budget.

Finally, the third column should be a list of your "Concerns." What are the aspects of downsizing that are keeping you "up at night?" This is important to identify the research you need to do in order to gain clarity on the situation.

Having a plan allows you to make any necessary changes before you start pouring energy and resources into the move and having to make expensive and time consuming changes. It's much easier to work things out on paper ahead of time

**Plan early, get where you
want to go faster & easier!**

Assess Your Current Situation

Knowing where you are right now will help you map out the path forward to get you to where you want to go.

It's kind of like Google Maps. Getting directions to your destination begins with knowing where you are starting from.

At this point, resist the urge to look into the future, focus on the here & now.

Take stock of your current living situation, including your finances, housing, and overall lifestyle. This will help you determine what changes need to be made and what you can realistically afford.

Create A Budget

Depending on your budget for downsizing, you will have different options available for your transition. Professional help to plan, prepare & execute your transition plans will surely make the process faster & likely easier.

When creating a budget, consider asking professionals, friends & relatives who have made a move recently about their experience. They will have a good idea of what items to consider.

Determine how much money you have available for downsizing and create a budget that includes all of your expenses. This will help you make sure that you have enough money to cover all of your costs.

Research Your Options

One of the great aspects of downsizing is that you have options! You've done the work to identify your needs, concerns & goals on your Downsizing Worksheet, now it's time to see what's available to you considering your situation.

Start with each of your "Needs" and consider the different options available to meet each on on the list. Don't hesitate to get a professional opinion as there may be available options available that you aren't aware of.

Look into different downsizing options, such as renting an apartment, buying a smaller home, or moving into a retirement community. Consider the pros and cons of each option and choose the one that best suits your needs.

Get Organized

It's time to roll up your sleeves, or bring in the professional help, to prepare for the move. Most downsizing situations means you will be taking less "stuff" with you than you currently are living with.

As you begin organizing your belongings, it's a great time to communicate with your family to see if items are best suited to be passed on to others & who wants what items after your passing.

Begin sorting through your belongings and getting rid of anything you no longer need. This will make it easier to move and will also help you adjust to a smaller living space.

The process of organizing can be overwhelming. You can be extremely detailed and go through each and every room, cabinet, drawer, closet and shelf. Everything needs to be considered! Sometimes just figuring out where to begin can be daunting.

Our advice? Start with your favorite room in the house and go room by room until you've made it all the way through your home.

Some folks like to take on the biggest challenge first, while others like to get small wins early by choosing the easiest room first to build momentum.

This process can take some time! You will likely revisit many memories as you make a determination of whether to keep, donate, or dispose of each item.

Pro Tip: Take pictures of all of your belongings and use labels, tags, or Post-it notes to identify which category items belong to.

**Get help when you need it.
Safety first!**

Seek Professional Help

We have found that the biggest worries in the downsizing process come from the uncertainty of the situation.

"What are my options?"

"Where will I end up?"

"Can we get all of this done in time?"

"Who can I rely on to help me?"

**If you need help downsizing,
consider hiring professionals.
They can help you with
everything from sorting
through your belongings to
finding a new home.**

You will likely need multiple different professionals to accomplish your goals when downsizing!

Lancaster Estate Solutions is a great place to start! We have all of the professional resources and experience you need to plan, prepare, and perform all necessary steps of the process to make your downsizing as "worry-free" as possible.

- Strategy & planning
- Budget development
- Identification of different Options
- Professional organizing
- Clean up & Clean Out
- Personal property liquidation (selling of items of value + donation services)
- Moving management & coordination
- Maintenance and Repairs
- Listing Preparation for home sale
- Real Estate Services to handle buying & selling
- Support when you need it
- Concierge-level service

Our primary goal is to provide you with a clear strategy to meet your needs, address your concerns, and ultimately get what you want. We have a Solutions Team in place that can deliver a custom solution for your unique situation.

We can help with as little or as much of the process as you need!

Stay Positive

Downsizing can be stressful, emotional, and frustrating. Change can be difficult. Try to focus on the benefits and the positive aspects of your new situation.

Time is one of the biggest factors in the process and can have a direct relationship to your level of stress. When you are making a move, pressure to meet a deadline can have a big impact on how you feel about your transition.

It's never too early to begin planning! Don't add extra pressure on yourself by waiting until the last minute.

Moving isn't generally considered "fun"... but the process doesn't need to be filled with worry. You've got this and we can help you.

**Remember that downsizing is
an opportunity to simplify
your life and make a fresh
start.**

