

## Checklist:

## 7 Tips for Successful Downsizing

Know what to get rid of and what to keep. Whether you are downsizing in place or moving to a smaller house, this checklist will help you minimize your possessions in advance.

- 1 Set a goal:** If you're selling a house, you'll want to move as quickly as possible to get it on the market. If your goal is to earn the most money for your auction items, you will spend more time on your cleanout. For downsizing in place, set a motivating deadline linked to a holiday or a family visit.

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- 2 Prepare an item list:** Identify top-priority items to keep, so that everyone knows what to look for. Focus on items that are valuable or sentimental, like photographs, artwork or stock certificates.

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- 3 Mark all items:** Before workers arrive to help, mark as many items as you can to Keep, Sell, Donate, or Discard. We use a different colored painter's tape for each category--painter's tape doesn't leave marks on items.

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- 4 Evaluate carefully:** As you determine what to keep, ask yourself three key questions: Do I love it? Does it fit and/or work properly? Have I used it in the last 12 months? If you answer "no" to any of those questions, mark it donate or discard.

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- 5 Digitize documents:** Old tax returns, financial statements and photographs take up a lot of space and weight. Consider converting them into scanned files and digital albums to free up valuable space.

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- 6 Research trash:** The average house cleanout generates an actual ton of trash. Contact your local waste center to find out drop-off hours and what trash they accept. This also applies to recycle facilities.

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- 7 Plan for donations:** Research local specialty donation centers, like Tech for Troops or Dress for Success. Contact charities in advance about their donation policies, pickup and drop-off options. Make sure their schedule aligns with yours.

We provide our DIY information as a service to families who are downsizing, settling estates or helping with a family member's transition to assisted living. If your project requires a physical transition or estate cleanout, give us a call anytime for a free consultation: (800) 913-7747.