



# Compass Rose Aging Well

## Tips for Downsizing

You've decided to downsize — this is a big step! Whether that means moving to a smaller home or an assisted living facility, chances are you will need to go through your things and decide what to keep and what to let go of.

Use this checklist to guide you through the downsizing process and ensure you keep what matters most.

### Make a Plan



Before you start downsizing, it's important to take time to map out your goals. Having a clear plan will help you stay focused and make informed decisions along the way.

- Determine your goals and reasons for downsizing — whether it is reducing costs, minimizing maintenance, or finding a better fit for your lifestyle.
- Establish a realistic timeline to keep the process manageable.
- Set a budget and research possible locations. Consider active adult communities and explore the people who live there, amenities, and activities they offer.

#### Ask Yourself:

Is my current home still the right fit for me, or would a smaller, more manageable space improve my quality of life?

### Declutter



Before you move, it's a good idea to sort through your things. This will help you figure out what is important to keep and take with you, and what you can get rid of.

- Eliminate duplicate items, paying special attention to kitchen tools, linens, and office supplies that can accumulate over time.
- Sort through old electronics to get rid of unused cords, chargers, and outdated devices you no longer need.
- Create keep, donate, sell, and throw away piles to help streamline the process.
- Involve family to help with making decisions and sorting, especially for sentimental or shared belongings.
- Label moving boxes by designated room and contents, such as "Kitchen" or "Bedroom," for easier unpacking.

#### Downsizing Tip:

If you are having a hard time letting go of your belongings, think about if you have used them the past year or if they really mean something special to you — like family photos or keepsakes.

## Get Organized



Organizing important details ahead of time will make the process easier and ensure that everything is in place for you to settle into your new home.

- Measure your new space to ensure your current furniture will fit in your new home. Request a floor plan or take pictures to help you visualize.
- Research storage options or ask family members if they can hold onto anything if some items won't fit in your new home but you're not ready to part with them.
- Gather important documents (financial, legal, medical, identification) in a secure, easily accessible place. Consider scanning digital copies for backup.

- Set up utilities (electricity, water, internet) at your new home and update your address with banks, subscriptions, and important contacts.
- Arrange for movers or request help from family and friends in advance, especially if heavy lifting is involved.

### Download our Guidebook:

To help you consolidate your important information, you can download our *Important Information My Family Should Know* guidebook by visiting [compassrosebenefits.com/Guidebook](https://compassrosebenefits.com/Guidebook).



Downsizing is a big step, but careful planning and organization can make the process smoother. Compass Rose Aging Well is here to help you navigate the journey with confidence. We help you assess your needs, connect with community resources, and make a plan that fits your lifestyle. Learn more and find out how to connect with our Aging Well resource coordinator at [compassrosebenefits.com/AgingWell](https://compassrosebenefits.com/AgingWell).

