

Senior Transition & Move Manager Blueprint

The Master Downsizing, Asset Protection & Relocation Guide

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Move | Relocation

TO DO Check List

Senior Move Preparation: The Ultimate To-Do List for a Hassle-Free experience. Getting older and moving to a new home doesn't need to be challenging. Whether you're a senior planning a move, or an adult child helping a loved one, the right preparation will reduce stress, save money, and smooth out the bumps ahead. Here's a detailed, *TO DO list* designed to make the process easier, less costly, and less stressful for everyone.

1. First impressions matter: A well-prepared home sells faster and for a better price.
2. Stress reduction: Planning ahead turns anxiety into manageable tasks.
3. Maximize profits: The more prepared you are, the better your sale outcome.

 **The #1 Mistake:** Rushing to clear out a home or dump items before conducting a thorough document search and professional asset valuation. Premature disposal often causes thousands in lost equity, lost records, and emotional regret.

1. Vital Personal Documentation, Legal & Financial Safeguards

Before packing a single box, locate and secure all essential records!

- [] **Identification & Vital Papers:** Original Birth Certificates, Social Security Cards, Passports, Driver's Licenses/State IDs, Marriage/Divorce Decrees, Military Discharge Papers (DD-214), Property Deeds, and Vehicle Titles.
- [] **Estate & Legal Directives:** Durable Financial Power of Attorney (POA), Healthcare POA / Medical Directives, Living Wills, Revocable/Irrevocable Trusts, Last Will & Testament, and Burial/Funeral Pre-plans.
- [] **Financial Accounts & Holdings:** Active Bank Account Numbers, Investment/Brokerage Statements, Pension & Retirement Files, Stock Certificates, Bonds, 7 Years of Tax Returns, Safe Deposit Box Keys & Location.
- [] **Medical & Insurance Portfolio:** Medicare/Medicaid Cards, Supplemental Health Insurance Cards, Long-Term Care Insurance Policies, Life Insurance Certificates, Prescription Lists, and Primary Physician Contacts.

2. Visual Estate Allocation Strategy (The Five Sticker System)

Conduct a room-by-room audit starting in high-density storage areas (garage, workshop, basement, attic) before moving to living quarters.

3. Workshop & Craftsman Asset Valuation (If Applicable)

Workshops and hobby rooms carry high hidden equity. Prevent general liquidators from bulk-selling specialized tools for pennies on the dollar.

- [] **Heavy Machinery & Power Tools:** Catalog table saws, planers, jointers, lathes, air compressors, and router tables (Delta, DeWalt, Milwaukee, Powermatic). Test power and record serial numbers.
- [] **Precision & Specialty Hand Tools:** Isolate cast-iron hand planes (Stanley Bedrock), precision measuring tools (Starrett), and trade-specific kits (plumbing, electrical, fine woodworking).
- [] **Transition Capital Generation:** Direct proceeds from tool sales directly toward senior living security deposits, specialized packing services, or strategic real estate prep.
- [] **The Apprentice Legacy Program:** Coordinate with local trade schools or vocational apprentices to pass down remaining tools, ensuring a lifetime of craftsmanship continues.

4. Strategic Real Estate Maximization Checklist (High-ROI Fixes)

Avoid expensive complete modern remodels. Focus strictly on cost-effective, high-yield improvements that increase buyer appeal.

- [] **Deep Clean & Odor Neutralization:** Professional carpet steam cleaning, ozone odor treatment (pet/smoke elimination), and deep cleaning of kitchens, baths, and windows.
- [] **Strategic Paint Refresh:** Apply fresh warm neutral paint (alabaster, greige) over scuffed, dated, or dark walls. Delivers highest return per dollar spent.
- [] **Curb Appeal Refinement:** Prune overgrown foliage, pressure wash driveway and walkways, apply fresh mulch, and update front entry lighting and hardware.
- [] **Fixture Modernization:** Replace dated brass light fixtures, cabinet pulls, faucets, and switch plates with brushed nickel or matte black hardware.
- [] **Staging & High-End Photography:** Once cleared, professionally stage primary living areas (living room, primary bedroom, kitchen) for high-impact digital marketing.

5. Logistics, Change of Address & Safety Adjustments

- [] **Mail & Account Address Transfers:** File USPS mail forwarding 3 days prior to move. Update address with Social Security Administration, banks, credit cards, investments, and subscriptions.
- [] **Utility Management Schedule:** Schedule shutoff/transfer for Electric, Gas, Water, Trash, Cable/Internet. Keep former home utilities active through real estate closing.
- [] **Medical Care & Pharmacy Cutover:** Transfer active prescriptions to a pharmacy near the new home. Coordinate medical record transfers between primary physicians and specialists.
- [] **CAPS Senior Safety Audit (New Home):** Verify Certified Aging-in-Place Specialist safety setup: install shower grab bars, verify slip-resistant flooring, ensure zero-step entryways, and improve lighting.

6. The 60-Day Master Staged Timeline



DAYS 1–15: Discovery, Document Security & Sticker Allocation

- [] Assemble fireproof Transition Binder (legal, financial, medical records). Store securely.
- [] Perform initial room-by-room audit using ● ● ● ● ● sticker visual allocation system.



DAYS 16–30: Asset Inventory & Liquidation Execution

- [] Catalog workshop, machinery, collectibles, and high-value ● Blue / ● Purple sticker items.
- [] Conduct targeted tool sales / consignments; execute Red Sticker Apprentice Legacy donations.



DAYS 31–45: Residence Finalization & Real Estate Strategy

- [] Finalize senior living community lease or purchase using calculated equity baselines.
- [] Lock in real estate pre-listing strategy, contractor schedule, high-ROI prep budget, and launch target.



DAYS 46–60: Relocation & Market Launch

- [] **Move ● Green items first:** Settle parents comfortably into new home before touching former home.
- [] Execute high-ROI prep (paint, deep clean, staging) on vacated home and launch to market.

Let Us Carry the Heavy Lifting

"You shouldn't have to choose between being a full-time project manager and being a supportive, loving son or daughter."

.... And for the SoloAger, the same applies. There's no need to be a project manager – we can help with that!

Navigating senior living placements, securing legal/financial records, itemizing workshop assets, and executing high-ROI real estate sales in our local market is a complex endeavor. You do not have to walk this path alone.

As a Certified Senior Advisor (CSA®), Real Estate Broker, CNA and Certified Aging-in-Place Specialist (CAPS), I bridge the gap between financial equity preservation, asset liquidation, aging-in-place safety, and seamless real estate sales—protecting your family's sanity while honoring your legacy.

Jeremy Hickling / CSA®, Broker, CAPS, CNA

The Check Off List – below

Move | Relocation - TO DO Check List

Why Preparation Matters

1. First impressions matter: A well-prepared home sells faster and for a better price.
2. Stress reduction: Planning ahead turns anxiety into manageable tasks.
3. Maximize profits: The more prepared you are, the better your sale outcome.

So, ...

Decluttering and Downsizing

Start Here: - Go room by room with a notepad, boxes, and bags. –

Label five piles or boxes – Get Your Color Stickers: **Keep | Donate | Give to family | Sell | Toss**

To-Do List:

- [] Schedule time for each room (don't try to do everything in one day).
- [] Recruit family, friends, or a professional organizer for help.
- [] Set aside sentimental items and decide whether to keep, pass on, or take photos for memories.
- [] Arrange donation pickups for large items.
- [] (If Applicable) Research and contact estate sale / auction, appraisal companies if you have many valuable items. (HEARTWISE HAS CONTACTS AND CONNECTIONS FOR THIS)
- [] Schedule time for adult children to review family keepsakes.
- [] Dispose of or recycle hazardous materials (old paint, chemicals, etc.) per local regulations.

(tip:) Advice for Everyone. Be patient and empathetic—it's about honoring years of memories, not just “stuff.”

Cleaning and Repairs

**Deep Clean: **

- [] Clean kitchens: appliances, cabinets, counters.
- [] Scrub bathrooms: sinks, toilets, showers/tubs, mirrors.
- [] Wash windows and baseboards throughout the home.
- [] Shampoo carpets and mop hard floors.
- [] Dust light fixtures, ceiling fans, vents.

**Repairs: **

- [] Fix dripping faucets or running toilets.
- [] Oil squeaky doors and tighten loose knobs.
- [] Patch and touch up paint on walls, doors, and trim.
- [] Replace burned-out bulbs.
- [] Check and repair cracked tiles or loose flooring.
- [] Secure or remove area rugs to prevent tripping.
- [] Test and secure handrails and grab bars.
- [] Replace missing or broken smoke detector batteries.

**Get Help If Needed: ** (Ask your CSA or Agent. They are your primary sources of assistance)

- [] Research and book a cleaning service for deep cleaning.
- [] Hire a handyman for minor repairs or bigger tasks.

**Staging Basics: **

- [] Remove excess furniture to open up rooms.
- [] Use neutral décor—simple bedding, uncluttered counters, and fresh towels.
- [] Ensure all rooms are well-lit (replace bulbs, open curtains).
- [] Arrange furniture to maximize easy movement and clear pathways.

****Show Off Accessibility: ****

- [] Highlight features like ramps, grab bars, walk-in showers, or main-floor bedrooms.
- [] Make sure these features are clean and in good condition.

****Affordable Upgrades: ****

- [] Add fresh flowers or a bowl of fruit in the kitchen.
- [] Place a cozy throw or attractive pillows in the living area.
- [] Hang a simple, cheerful welcome sign or wreath on the door.

Curb Appeal—Don't Forget the Outside!

****Tidy Up: ****

- [] Mow the lawn and trim bushes.
- [] Weed flower beds and add mulch if needed.
- [] Sweep walkways and porches.
- [] Remove cobwebs from entryways and eaves.

****Welcoming Entry: ****

- [] Paint or wash the front door.
- [] Replace or polish house numbers and mailbox.
- [] Add a new welcome mat or potted plant.

****Final Check: ****

- [] Walk outside and view your home as a buyer would. Note any needed improvements.

Pro Tip: Curb appeal often adds thousands to your home's value and it doesn't have to cost much!

Paperwork and Practical Planning

- [] Gather important documents (deeds, warranties, appliance manuals, HOA info, utility bills
- [] Make a list of service providers (lawn, cleaning, maintenance) for future reference or to pass to buyers.
- [] Forward mail and update address with banks, doctors, and insurance.
- [] Schedule moving company estimates and book early for best rates.
- [] Prepare a “moving day essentials” kit (medications, snacks, important papers, phone chargers, basic toiletries).

Final Steps: The Smooth Transition

- [] Confirm move-in dates and logistics for your new home or retirement community.
- [] Arrange for help at both ends—packing, loading, and setting up.
- [] Plan a farewell gathering, if desired, to celebrate memories.
- [] Take photos of the empty home for your records and closure.

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