

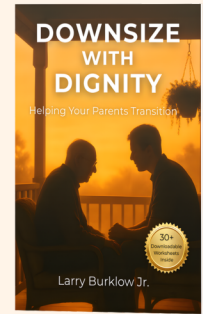
The 2-Page Senior Downsizing Master Timeline Checklist

A warm, step-by-step roadmap for adult children helping aging parents transition with dignity. Cross-referenced with all 7 free downloadable worksheets.

COMPANION TO THE BOOK

Downsize with Dignity: Helping Your Parents Transition

By Larry Burklow Jr.
Available at Amazon,
Barnes & Noble,
independent bookstores
& libraries nationwide



Phase 1

Preparation & Planning

3-6 months out

- ☐ Schedule a dedicated family conversation. Understand your parent's wishes and timeline before any decisions are made
→ *Worksheet 1: Starting the Conversation*
- ☐ Build your team: clarify family roles, senior move manager, real estate agent, and estate attorney
- ☐ Get floor plans of the new space. Know what furniture will realistically fit before you touch a single box
- ☐ Clarify who pays for what, document shared costs in writing to avoid family tension later
→ *Worksheet 3: Who's Paying for What?*
- ☐ Locate and photocopy all critical legal documents: will, power of attorney, advance directive, deeds
→ *Worksheet 5: Legal Documents Tracker*
- ☐ Set a realistic move date and work backward, assign tasks and owners across the timeline

Phase 2

Sorting & Decluttering

2-3 months out

- ☐ Walk through every room together and inventory what matters. What holds meaning and what holds value.
→ *Worksheet 2: Spotting the Real Treasures*
- ☐ Use the 5 Step Sorting System to sort everything Keep · Donate or Sell · Give to Family · Ask the Grandkids · Not Sure Yet
- ☐ Hold a structured sibling distribution conversation. Give everyone a fair, organized way to claim meaningful items.
- ☐ Schedule an estate sale, consignment pickup, or donation drop-off for items not being kept
- ☐ Safely dispose of old medications, hazardous materials, and outdated paperwork
- ☐ Photograph sentimental items that can't come along. Preserve the memory, not just the object

All 7 Worksheets are free to download: Individually, or as the complete *Downsize with Dignity: Companion Workbook* at helpingparentsdownsize.com/downsizing-worksheets

“You're not just helping them move. You're honoring everything they built.”

Larry Burklow Jr.
helpingparentsdownsize.com

- ☐ Submit USPS mail forwarding and update banks, insurance providers, and subscriptions with the new address

- ☐ Update Medicare, Social Security, and financial institutions with the new contact information

- ☐ Review all accounts for unauthorized activity. Transitions are prime time for scams targeting seniors
→ *Worksheet 4: Accounts, Access & Avoiding Scams*

- ☐ Book a moving company experienced with senior relocations: confirm date, insurance, and fragile-item handling

- ☐ Notify all healthcare providers, for both parents (if applicable) and coordinate care continuity with the new facility or housing coordinator
→ *Worksheet 6 & 6B: Healthcare Decisions & Contacts*

- ☐ Confirm what the new home provides (furniture, linens, meals). Don't move what's already there

Notes

Your thoughts, questions, decisions

- ☐ Pack a "Day 1 Essentials" bag your parent can reach immediately: medications, documents, comfort items, chargers
→ *Worksheet 7: First-Day Packing and Essentials Checklist*

- ☐ Do a final walkthrough of every room, closet, cabinet, attic, garage, and storage area: Leave nothing behind

- ☐ Confirm utilities are scheduled for transfer or cancellation on the right date: electric, gas, water

- ☐ Confirm internet and security equipment, either cancel or move service. Schedule return of any equipment.

- ☐ Arrange a final clean of the home, professional or family-led, after the truck has gone

- ☐ Make sure a family member is at the house during the move, with your parent(s) to answer any questions.

- ☐ Brief all helpers on the day's plan, your parent's mobility needs, and anything requiring extra care

- ☐ On moving day: keep routine as normal as possible: familiar things first, comfort before efficiency

- ☐ Take photos of the old home: empty rooms, the front door, the yard, before you leave for the last time

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