

COUNTDOWN to Moving Day Checklist

The clock is ticking! Moving into a senior living community doesn't happen overnight. It requires a bit of preparation, both for the move itself and for transitioning your loved one into a new home. Many families have found success by hiring senior move and relocation specialists who can bridge the gap between well-meaning families and your anxious loved one. Ask your senior living community for recommendations.

If you decide to manage the process yourself, here's a week-by-week checklist to help you settle your loved into their new home.

Week 6: Get Organized

- ☐ • Visit the community for a floorplan, room/closet measurements, and list of suggested items to bring.
- ☐ • Put family heirlooms, jewelry or other valuables into safekeeping.
- ☐ • Locate and scan your loved one's important documents and save them online, including:
 - ☐ • Names/contact information of healthcare, legal and financial professionals
 - ☐ • Identification (Social Security, Medicare, birth certificate, passport, driver's license, etc.)
 - ☐ • Financial documents (banks, pension/retirement, investments, insurance, titles, and deeds)
 - ☐ • Legal documents (wills, trusts, power of attorney, advance directives, etc.)
 - ☐ • Account information (checking, savings, credit cards, etc.)
 - ☐ • Pictures/videos of valuables for insurance claims
 - ☐ • List of personal liabilities
 - ☐ • State/federal income tax returns
- ☐ • Put these healthcare, financial and legal documents in your home or another safe place.
- ☐ • Let your loved one know where their documents are so they can locate them when needed.

Deciding to move your loved one into a senior living community challenges everyone. But sorting through their things and moving out of what's often a lifelong home can feel like a significant loss to your loved one. Keep your loved one involved throughout so that they will feel a part of the process.

Week 5: Schedule a Mover

- ☐ • Ask your community for moving company recommendations.
- ☐ • Get cost estimates and availability for three to five movers.
- ☐ • Read their online reviews.
- ☐ • Make sure your moving company is properly licensed and insured.
- ☐ • Ensure that the mover you choose can move heavy and specialty items.
- ☐ • Order moving materials (boxes, tape, markers, bubble wrap, etc.).
- ☐ • Take pictures of everything in your loved one's home and send them to family members.
- ☐ • Check the freezer and make plans to consume food or donate it before moving day.
- ☐ • Recruit friends and family members to help with packing.

Weeks 3 and 4: Downsize and Pack

- ☐ • Determine, with your loved one, which family members will be receiving what items.
- ☐ • Label and set aside those items that will be going with your loved one to the senior community.
- ☐ • Create areas for items that will go to family members or will be sold, donated, or discarded.
- ☐ • Assess each item and put it in the appropriate area.
- ☐ • Pack up each area and clearly label boxes according to their destination.
- ☐ • Move out any items that are being discarded or donated.

Week 2: Finish it Up

- ☐ • Finish packing up this week.
- ☐ • Clean the home (or hire a cleaning service) and/or take care of maintenance issues prior to renting or selling the home.
- ☐ • Make an appointment with your loved one's primary care physician or, if they're moving out of the area, find a new primary care doctor.
- ☐ • Make a list of all medications and dosages.
- ☐ • Check in with your loved one to make sure they're doing OK and have what they need.
- ☐ • Make arrangements with family members to pick up or ship items to them.

Week 1: Take Care of Business

- ☐ • Pack a box with all of the things that you'll need on the first night (bedding, toiletries, contract, clothing, pajamas, pet supplies, cash, etc.).
- ☐ • Confirm with your loved one's new community that all paperwork has been completed.
- ☐ • Confirm and finalize details with your mover.
- ☐ • Get the community's gate codes or arrange for any access cards for moving day.
- ☐ • Cancel existing utility and other services (electric, gas, phone, cable, lawn care, etc.).
- ☐ • Get an emergency pendant for your loved one (if the community does not provide one).
- ☐ • Make a list of companies and individuals who need to know about your loved one's new address.
- ☐ • Visit the U.S. Postal Service for Change of Address forms.
- ☐ • Let family and friends know about your loved one's new contact information.
- ☐ • Put your loved one's schedule and new contact information in your devices.

Moving Day

- ☐ • Assign someone to meet the mover at the new community.
- ☐ • You're in! Prepare to spend the first couple of days helping your loved one unpack and get settled



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