

Your Downsizing & Move Toolkit

A practical, room-by-room guide to sorting, planning, and settling into your next chapter — at your own pace.

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A NOTE FROM LARRY

Let's Make This Easier

Leaving a home filled with years of memories is one of the biggest transitions a family can go through — and it's rarely just about the “stuff.” It's about the decisions behind each item, the timeline, and knowing someone experienced has your back.

Before I focused on real estate, I spent seven years running my own senior transition business, walking families through exactly this process room by room. I built this toolkit from that experience, so you (or the family member helping you) can move through sorting and planning without feeling overwhelmed. Use it at your own pace — fill it out over a few weeks, or power through it in a weekend.

Inside this toolkit: a room-by-room sorting worksheet, a step-by-step moving timeline, and an “administrative binder” checklist for the documents that should never end up in a moving box.

When you're ready to talk through next steps — whether that's prepping the house, coordinating movers and downsizing specialists, or just asking “where do I even start?” — I'm one call away.

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TOOL 1

Room-by-Room Sorting Worksheet

Tackle one room at a time. Write the room name at the top, then work through what's inside — shelf by shelf, drawer by drawer. Photocopy this page (or print extras) for each additional room.

Stuck on a decision? Try the 3-Question Sort

1. Have I used it, worn it, or loved it in the past year?
2. Would I buy it again today, knowing what I know now?
3. Is there someone specific in my life who wants it?

Two “no” answers → it's probably ready to donate, sell, or let go of. A “yes” to #3 → set it aside to gift directly instead of packing it “just in case.”

Room: _____ Date started: _____

ITEM / CATEGORY	KEEP	DONATE	SELL	DISCARD	UNSURE	NOTES / WHO GETS IT

Tip: Rooms to plan for — Kitchen · Living/Dining · Primary Bedroom · Other Bedrooms · Bathrooms · Garage · Attic/Basement · Outdoor/Shed

TOOL 2

Downsizing & Moving Timeline

A general roadmap — adjust the pacing to fit your move. Larry can help coordinate vetted downsizing specialists, movers, and cleaners for any of the steps below.

3+ Months Before

- ☐ Have an honest conversation with family about the plan and timeline
- ☐ Meet with Larry for a free consultation on home value and next steps
- ☐ Begin the Room-by-Room Sorting Worksheet, one room at a time
- ☐ Research your next residence (size, location, care needs)
- ☐ Gather documents for your Administrative Binder (see Tool 3)

6-8 Weeks Before

- ☐ Measure your new space; note what large furniture will actually fit
- ☐ Schedule donation pickups and/or an estate sale or online listing
- ☐ Get moving quotes; book your mover or downsizing specialist
- ☐ Start using up food in the freezer/pantry
- ☐ Begin packing non-essential rooms (guest room, storage areas)

2-4 Weeks Before

- ☐ Submit your Change-of-Address Log items (see Tool 3)
- ☐ Transfer or schedule disconnect/connect for utilities
- ☐ Arrange prescription transfers with your new pharmacy
- ☐ Confirm moving day logistics (parking, elevator reservations, timing)
- ☐ Set aside your Administrative Binder to travel with you personally

Moving Week

- ☐ Pack a first-night bag (medications, chargers, toiletries, a change of clothes)
- ☐ Keep the Administrative Binder, jewelry, and valuables with you — never in the truck
- ☐ Do a final walkthrough of every room, closet, and drawer
- ☐ Leave keys/garage remotes/manuals for the new owners, if applicable

After You're Settled

- ☐ Update your driver's license/ID with your new address
- ☐ Register with a local doctor, if you've relocated out of area
- ☐ Send a note to family and friends with your new address
- ☐ Celebrate — this was a big undertaking!

TOOL 3

The “Don't Pack This” Administrative Binder

Before moving day, gather these documents into one folder or binder that travels with you personally — never in the moving truck.

Identity & Legal

- ☐ Birth certificate(s)
- ☐ Social Security card
- ☐ Passport
- ☐ Power of Attorney
- ☐ Will / Trust documents

Financial Records

- ☐ Recent tax returns
- ☐ Vehicle title(s)
- ☐ Outstanding debt/loan statements
- ☐ Bank & account summary sheet

Medical & Health

- ☐ Current prescription list
- ☐ Pharmacy transfer info
- ☐ Insurance / Medicare card(s)
- ☐ Key specialist contact list

Change-of-Address Log

- ☐ U.S. Postal Service
- ☐ Utility providers (electric, gas, water, internet)
- ☐ Banks & credit cards
- ☐ Subscriptions & memberships
- ☐ Family & close friends

Keep this binder within arm's reach on moving day — in your car, purse, or carry bag, not on the truck.

Ready to Talk Through Your Move?

Whether you're just starting to think about downsizing or you have a moving date already circled on the calendar, I'm here to help you sort out the real estate side — and connect you with trusted movers, cleaners, and downsizing specialists.

SCHEDULE YOUR FREE SENIOR CONSULTATION

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