

# Estate Downsizing for Caregivers

**Transitioning from a home to  
an apartment or care facility**

**Susan Bewsey**



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*“To the world you may be one person, but to one person, you may be the world.”*

— DR. SEUSS/BILL WILSON



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## Preface

This book came about because I was downsizing, people around me were downsizing, and we were all looking for help in some fashion. I was inspired by a request to share my experiences and to shift focus from outlining a model of a downsize business to preparing a practical guide for volunteer caregivers and individuals facing these scenarios.

I have included references that assisted me in composing this writing, but realize that many individuals, particularly our more senior elders may not have access to computers. I urge caregivers and others to assist by printing out information that may be of use in having dialogue on downsizing with elders in their care.

I tried to write this simply, practically, and in a positive light. I played music from various eras as I dealt with subjects that sometimes were emotionally challenging to write. I try to bring the reader through the steps involved in downsizing in sequence or chronological order, although at times that is not always possible because events can and do occur at the same time, and we are called upon to put on our juggling hats. I hope that reading this book may offer an oasis of calm in a sea of information when a downsizing situation occurs in your life.

What help we as caregivers are able to provide and receive is changing in a rapidly progressive world. Caregiving now encompasses fields of professional study, licensing, associations, and organizations. Once upon a time it was done for no compensation by family, friends and neighbors, and indeed throughout the world it still is. This guide is intended for the unpaid, unsung heroes who offer their time and energy in support of others.

Downsizing is a routine part of life. We transition from acquiring belongings for many years to the disposition of those very belongings. Although disposing of things may seem a straightforward exercise, downsizing without planning can be a taxing, complicated exercise fraught with challenges and stress. In addition to the physical aspects of contending with sorting, taking inventory, valuing, storing, and disposal of goods, is the emotional and psychological toll taken on all parties involved in seeing a downsize task through to completion all the while attending to the personal needs of individuals.

In my life, I have experienced several sudden downsizings. I was called upon to assist in the transition of elderly individuals as they moved into long-term care; I have helped out in sudden death scenarios; relocated a blind widower and his possessions to his country of birth; and I have helped in a downsizing due to illness and disability. The phone lines burned back and forth as friends offered and shared suggestions and experiences. Although there was writing on the subject in magazines, periodicals, and brochures, I found nothing all under one roof. Guidance and information gathered was often written in difficult to understand context or legalese and was only available to me if I knew to ask for it.

I found little in the way of practical steps to take and when to take them. It was a hard learned lesson a day, or so it seemed. Over the years I have collected and maintained information from many sources in an attempt to piece together a roadmap for when the situation presents itself again.

The writing of this is, in part, because of my desire to share valuable information and lessons learned with a receptive audience, and as a cathartic exercise in seeing downsizing as a positive and inevitable experience.

For individuals with downsizing needs, this guide is intended to assist you in conducting your own downsizing, by assembling a team of help. For individuals who will be assisting others, this guide is intended to provide guidance on how to proceed with decision making. For those in the midst of a career change, this guide may assist you in

discovering an employment niche, or a business concept to which you can apply your knowledge and skills.

Please read through the sections that may be appropriate for your situation; use the questionnaires as a guide, write on them, personalize them as needed, print them from the download kit included with this book, and start your own downsizing plans.



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# Introduction

## 1. What Is Downsizing?

*Downsize (verb): to make something smaller or to undergo a reduction in size or quantity.*

There is more than one time in our lives when we experience downsizing. We downsize when we leave a childhood home to set up our first apartment for school or for a job in a new locale. We downsize when we may have personally been downsized in our jobs or careers. We downsize when our relationships with others have changed, in partnering, in the dissolution of a partnership, as a result of the passing of a significant other, or to accommodate a friend or family member. We downsize when we grow older and no longer wish to, or are able to maintain our family homes and sometimes we downsize to simplify our lives.

Each time we downsize, we are responding to adjusting physical spaces to suit financial, physical, and emotional needs, or any combination of life-altering circumstances.

According to statistics provided by the governments and organizations of Canada,<sup>1</sup> the United States,<sup>2</sup> the United Kingdom,<sup>3</sup> and Australia,<sup>4</sup> demographic studies reveal that approximately 79 to 100 million people will be retiring and an estimated 10,000 people in North America alone will turn 65 every day for the next 19 years.

This is relevant because the baby boomers, their children, and their parents will be altering living arrangements and adjusting their lives to embrace new normals.

The parents of the baby boomers, aged 71 plus currently — the silent generation — will require accommodations in retirement homes, assisted living residences, or with friends or family. The children of baby boomers, aged 29 to 44 — the Gen X'ers — will make living arrangement changes to accommodate their own migrating families and jobs. Another 100 million movers, the Millennials<sup>5</sup>, aged 29 and younger are embarking on establishing their own careers, lifestyles, and families. There is a boomerang generation<sup>6</sup> who return home to care for elderly or disabled family members, or for economic reasons. And there are the lifestyle changes of places and spaces for people living newly single lives by choice or circumstance.

We are coming into an era that is experiencing a boom (or spike upward) in providing caregiving and downsizing services to people in transition. For some, their downsizing projects will be initiated by choice, such as a lifestyle change to minimize, a planned downsize; for others, it will be as a result of an unexpected circumstance such as illness, financial catastrophe or death, a sudden downsize. If we are fortunate, with good mental and physical health, we will be the architects of our downsizing experiences. We will perform tasks on our own or delegate tasks to service providers or caregivers, both personal and professional. The circumstances will depend on our abilities and preferences at the time, or by the measures we have previously put into place, such as instructions we have formally or legally directed to a lawyer, or a representative such as a relocation advisor, a professional organizer, or downsizing service provider who will be carrying out our wishes by contractual agreement.

In my research, I discovered many gifted writers on the subject. Resources online today are numerous, many more than when I was

1 \*Census in Brief — Generations in Canada — Age and sex, 2011 Census. [http://www12.statcan.gc.ca/census-recensement/2011/as-sa/98-311-x/98-311-x2011003\\_2-eng.pdf](http://www12.statcan.gc.ca/census-recensement/2011/as-sa/98-311-x/98-311-x2011003_2-eng.pdf)

2 US <http://www.pewresearch.org/daily-number/baby-boomers-retire/>

3 Population UK. <http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Population#tab-sum-pub>

4 australia.gov.au. Baby Boomers-<http://australia.gov.au/about-australia/australian-story/baby-boomers>

5 <http://www.pewsocialtrends.org/2012/03/15/the-boomerang-generation/>

6 <http://www.pewresearch.org/2009/12/10/the-millennials/>

caregiving and downsizing for others a few short years ago. Availability of information on the subject has increased, including in-depth information respecting aging and caregiving posted online by governments. I followed URLs and blogs about downsizing, read newspapers published from one coast to the other, scanned and clipped magazine articles, and continued to collect brochures and informative literature. I discovered that downsizing and caregiving were beginning to be featured on a regular basis.

I discovered many businesses evolving to meet the growing demand for downsizing assistance by aging and transitioning people. From small towns to large urban centers, entrepreneurial, service-minded individuals were offering downsizing services. Some models were very efficient and professional, while others were evolving in their quest to find an employment niche in a growing downsizing marketplace. The one message that remained consistent was that there is an ever-growing need for help and a growing shortage of helpers.

## 2. Who Are the Caregivers?

Almost every one of us will provide some form of caregiving in our lives. Some people will be trained and employed in specific fields of caregiving, but most will be everyday people who volunteer their time to help friends, family members, and neighbors.

A caregiver is defined by Merriam Webster dictionary as “a person who gives help and protection to someone (such as a child, an old person, or someone who is sick,” or “a person who provides direct care (as for children, elderly people, the disabled or the chronically ill.”

There are live-in caregivers, companion caregivers, and family caregivers to name a few possibilities.

Caregivers provide support and care to reduce the suffering of another, and assist in coping and functioning. Caregiving can reduce the financial burden on families and governments, often to the detriment of the caregivers’ own well-being. Caregivers tend to be empathic individuals; they may also be professional individuals who possess the skills, training, and accreditation to provide support within a defined job description.

The characteristics of a caregiver may be defined simply by looking into your mirror.

This book and the exercises herein were created for the individual and the nonprofessional caregiver (volunteer) who needs to downsize personally or for another person.

Some interesting statistics I discovered while researching caregivers: A 2001 census in the UK revealed that 6 million or more people provided unpaid care for a relative, friend, or neighbor and at least one third of all people will be providing care to another in their lifetime. Further, more than 175,000 caregivers are under the age of 18. Italy has the highest percentage of people aged 65 or older. More than 1.5 million people under the age of 25 in Australia are facing care responsibilities for an elderly or disabled person. More than 10 million people are needed to provide care today to an aging population in China. And in the US, 43.5 million adult family caregivers care for someone aged 50 and older and 61.6 million people have provided unpaid care to another in the recent past.

Unpaid caregiving provided by volunteer and family members saves governments billions of dollars annually in providing care for the elderly and the disabled; it eases stress on the health system and the support of caregivers is encouraged to continue.

This altruism and responsibility however comes at a cost to the caregiver in the toll it takes on them physically, mentally, emotionally, and financially; indeed there is a term for it, it is called “caregiver burnout” and individuals are encouraged to read up on the subject. Precautionary measures, such as learning to deal effectively with the downsizing of our estates, as well as how to protect our health, will help to ensure our own well-being and the well-being of those of will be tasked with our care.

### 3. Who Downsizes?

Who downsizes and for whom?

- Self.
- Spouse for spouse.
- Children for parents.
- Children for grandparents.
- Caregivers for the elderly or the disabled.
- Trustee/guardian/executor for those under care.
- Parents for children.
- Sibling for sibling.
- Friends for others.
- Legal representatives.

- Arm's length individuals.
- Strangers / advocates.
- Community workers for clients.
- Moving and downsizing companies for clients.
- Employees for employers.
- Other.

When does downsizing occur?

- Moving away to a school or job.
- Moving in with a roommate.
- Moving into a smaller home.
- During renovations/temporarily.
- Moving in with family.
- Moving to a care facility.
- After an illness.
- After a death.

For which of the above situation(s) do you feel you need to prepare yourself?

Will you be doing the downsizing alone from start to finish, or will you have help? If you have done this before, what will you do differently this time? Why?

## 4. What Do We Downsize?

When downsizing, we reduce our belongings, homes, cottages, vehicles, books, artwork, music, clothing, jewelry, toys, tools, stuff, real estate, intellectual property, money, investments, things we own that we purchased, inherited, acquired, built or created can be used to define our economic standing in a community, showcase our interests and hobbies, for investment purposes, and for sentiment.

We are coming into the greatest trade-off of our belongings in history and the resulting trillions of dollars to baby boomer heirs and beneficiaries.

Our belongings make up some of that hand-over.

## 5. A Little History: How Has Downsizing Changed?

We have great grandparents, grandparents, uncles, aunts, and parents; sometimes two sets of families or friends, or more, living and passing on histories and belongings. These are our elders.

In the past things were passed down from generation to generation and family members or close friends attended to wrapping up the affairs of the elderly and distributing belongings, as directed verbally, or as they saw fit.

A look at Table 1 may give you an idea of some of the events our elders have seen, heard and experienced as life was humming along waiting for us to grow older.

When the baby boomers were young and in the acquiring stages of life, belongings came from various sources. Some things were purchased and other items were acquired by inheritances. Think about the excitement of finding a vintage vehicle intact under a tarp in Grandfather's barn, or heirlooms still packed in trunks from a journey across oceans by immigrating families who left homes and family to make their way in newer worlds.

Once there were door-to-door salesmen selling wares, and items were purchased from mail-order catalogues. Before Google and countless other free online search engines, knowledge and facts were gleaned from the likes of the *Encyclopedia Britannica* which was distributed by salesmen who carted leather satchels, heavy with bound tomes, to suburban homes. Fuller Brush knocked on doors to promote cleaning brushes and products to follow up after the diminishing industry of cleaning military brushes when the war ended. Avon encouraged women to become independent businesspeople by utilizing their socializing and networking skills with other women. It was a time of growing consumerism. Prior to this, to survive the Depression, people traded and shared goods and homes, repaired things, and goods were recycled; to think that once, people would use catalogues as toilet paper! Items that were sale worthy were often exchanged for food or donated to the less fortunate as few were buying anything in the Depression era. People owned less and were frugal. People became great savers and as a result their children became inheritors of their belongings.

The world changed after the two World Wars. Returning servicemen were required to focus on rebuilding their lives, families, and communities. In the mid 1940s, the baby boom commenced. Babies were born in record numbers, houses were built, industries were established, and employment was booming along with industry growth.

The average size of a middle-class suburban house in 1950 was typically under 1,000 square feet with two or three bedrooms and one (perhaps one and a half) bathroom(s).

Yards were large and landscaped. Lawns were cut with push mowers. There was a stay-at-home parent, often the mom, a black and white television with a limited number of channels that were broadcast for a limited time each day. People planted vegetable gardens and fruit trees. Fortunate families had one car. Tract houses were built close to industry and factories to meet housing demands during housing shortages, and until such time as the construction industry and incomes provision could catch up. The concept of mortgages was expanded to more people, for larger homes and growing families. Clothing was washed in wringer washing machines and hung on clotheslines to dry, and was ironed and mended. Sewing machines and sewing kits were a staple. People had daily chores to maintain their homes and families and meals were cooked three times or more daily. Milk and mail were delivered to the door, and bread was home-made or purchased fresh from local bakeries. Few people had vacuum cleaners; floors were swept, handwashed, and waxed with paste wax.

People listened to radios as a family activity, and once a week, maybe would go to an afternoon movie. The extravagant cost of a movie and popcorn was 10 to 25 cents depending on the movie house.

Handkerchiefs were used compared to disposable tissues today, and microwaves were the stuff of science fiction movies. Those who acquired the luxury of a telephone used an operator to dial, or had to wait until another party freed up space on telephone lines so they could make a call (or listen in on others' conversations, as party lines were *de rigueur*).

Often, grandmas and grandpas could be found living with their adult children, still contributing to the family. In familiar surroundings they were indulged by their expanding families, cooking, using tools and adding colorful stories to family dinners. Many of these elder generations were immigrants who had fled their native countries following the war to start a new life. What they owned or brought from their past such as framed photos, books, Bibles, wedding dresses, and tools were stored in trunks in their rooms, or attics, and had to be shipped by sea, or brought with them on the voyage to a new world. Often there was a hushed and respectful indulgence to aging memories and bodies given health appropriate tasks to accommodate their need to be needed and contribute. Children would learn from this scenario that there were many generations in a family and different

stages to accommodate, endure and live in close proximity to. There was respect and tolerance offered. Our elders then were not the invisible ones.

The rebellious youth (perhaps now known as your parents or grandparents) as teenagers were discovering music, poodle skirts, the drive-in restaurant, and rock and roll. These are our baby boomers.

Fast forward to today, homes have more than doubled in size, and hardly a granny or grandpa is to be found on the premises. Farms have become suburbs and cities with all the amenities associated; day-to-day living seems to go at a very fast pace. We have acquired more over the years through purchasing and inheritance, and we are now facing what best to do with the belongings as we face our own downsize situations in a very fast and disposable world.

What are we acquiring now? How and why? Can you fill in the blanks in Table 1?

Yes, the world has changed and, in many ways, despite the increase in population it has become more diverse and a little less mysterious. Travel, both physical and virtual, has allowed us embrace more cultures and experience more styles. It is easier to understand and acquire the exotic as well as the common as we are able to acquire belongings from different places and peoples. There is a greater compilation of history from many sources such as family biographies and genealogy. We now have the added benefit of documenting our lives online for select audiences or larger audiences, for private sharing or for public sharing. Household luxuries we acquired on our independent journeys are now sought by others on journeys toward making their own new homes.

As you prepare to research the values of your soon-to-be-downsized belongings, you are advised to consider the era and uses of those things and what is nostalgic about them which could result in them being more sought after. What is your motivation as you pass along your belongings, your history? What memories will you be marketing? What sentiment are you selling or donating? Who can afford it and who wants it?

As you think about distributing your belongings, you might consider where they came from and their nostalgic value to you or possibly to others. Were they:

- Inherited?
- Collected?

Table 1  
POSSESSIONS THEN AND NOW

<b>Era</b>	<b>What did we acquire?</b>	<b>Top music and books</b>	<b>Top news story and celebrity</b>
1940's persons now aged 70+	<ul style="list-style-type: none"> <li>• land</li> <li>• tailored clothing, hats, gloves</li> <li>• a car</li> <li>• furniture</li> <li>• china</li> <li>• typewriters</li> <li>• records (78 rpm)</li> <li>• magazines</li> <li>• cigarettes</li> <li>• small appliances</li> <li>• musical instruments</li> <li>• toys</li> </ul>	<ul style="list-style-type: none"> <li>• swing music</li> <li>• bobby socks</li> <li>• Benny Goodman</li> <li>• Glenn Miller</li> <li>• Jimmy Dorsey</li> <li>• Bing Crosby</li> <li>• Frank Sinatra</li> <li>• "I'll never smile again"</li> <li>• "I Love You for Sentimental Reasons"</li> </ul>	<ul style="list-style-type: none"> <li>• Pearl Harbor</li> <li>• Anne Frank</li> <li>• D Day</li> <li>• Hiroshima</li> <li>• Bikinis</li> </ul>
1950's persons now aged 60+	<ul style="list-style-type: none"> <li>• houses, bungalows</li> <li>• furniture</li> <li>• larger appliances</li> <li>• toasters, mix masters</li> <li>• jewelry</li> <li>• party clothes, knee length skirts</li> <li>• sports cards</li> <li>• sunglasses</li> <li>• fashionable things</li> <li>• perfumes</li> <li>• sewing machines</li> <li>• stamp collections</li> <li>• toy collections</li> <li>• records (45 rpm)</li> <li>• black and white TV's</li> </ul>	<ul style="list-style-type: none"> <li>• Rock and roll</li> <li>• Elvis Presley</li> <li>• McGuire Sisters</li> <li>• Fats Domino</li> <li>• Rosemary Clooney</li> <li>• Duke Ellington</li> <li>• Ray Charles</li> <li>• Doris Day</li> <li>• Everly Brothers</li> <li>• Dinah Shore</li> <li>• Peggy Lee</li> <li>• "Johnny Be Good"</li> <li>• "Heartbreak Hotel"</li> <li>• "Rock Around the Clock"</li> </ul>	<ul style="list-style-type: none"> <li>• credit cards</li> <li>• Korean War</li> <li>• colour television</li> <li>• seat belts</li> <li>• Queen Elizabeth</li> <li>• polio vaccine</li> <li>• first Playboy</li> <li>• Disneyland</li> <li>• hula hoops</li> <li>• Lego</li> <li>• NASA</li> <li>• peace symbol</li> </ul>

<p>1960's persons now aged 50+</p>	<ul style="list-style-type: none"> <li>• telephones</li> <li>• jewelry</li> <li>• birth control</li> <li>• colour televisions</li> <li>• records (the LP)</li> <li>• fancier appliances</li> <li>• bigger cars</li> <li>• cameras</li> <li>• packaged food and treats</li> <li>• wall to wall carpets</li> <li>• mono shirts</li> <li>• toaster and microwave ovens</li> <li>• GI Joes and Barbies</li> <li>• instant coffee</li> <li>• blue jeans</li> <li>• macrame</li> </ul>	<ul style="list-style-type: none"> <li>• Beatles</li> <li>• Supremes</li> <li>• Bee Gees</li> <li>• Cream</li> <li>• Del Shannon</li> <li>• Bob Dylan</li> <li>• Rolling Stones</li> <li>• Beach Boys</li> <li>• Jim Hendrix</li> <li>• Led Zeppelin</li> <li>• CCR</li> <li>• The Weight</li> </ul>	<ul style="list-style-type: none"> <li>• birth control pill</li> <li>• man on the moon</li> <li>• first James Bond movie</li> <li>• Marilyn Monroe's death</li> <li>• Kennedy assassinations</li> <li>• Nelson Mandel imprisoned</li> <li>• Star Trek</li> <li>• Sesame Street</li> <li>• ARPAnet (1st internet) created</li> </ul>
<p>1970's persons now aged 40+</p>			
<p>1980's persons now aged 30+</p>			
<p>1990's persons now aged 20+</p>			
<p>What are we buying now?</p>			

- Purchased?
- Built?

## 6. Downsizing Considerations

Before you plan to move or embark on a downsize project, give thought to your personal situation as it is and how it will be and what time frame you are considering.

- Is there an urgency to the downsize you are considering?
- What are the time constraints?
- What are the physical constraints?
- Is achieving value for your belongings necessary to fund a relocation or other expense?
- Is preserving history of items of significance to you or another?
- Are there other issues about your possessions that need to be considered?
- Is there a need or want to replace belongings?
- Will you be hiring, subcontracting, or using professional downsize services?
- Will you be getting assistance from volunteers, friends, or neighbors?
- What repairs are needed?
- What storage is needed?
- What disposal arrangements are needed?
- Do you have outstanding authorities, or legalities such as contracts or powers of attorney to attend to?
- What government notifications, trustees, or guardians will be required, if any?
- Will you need new insurance, nursing, or security services?
- Do you have to transfer extended warranties or transferable service contracts?
- If you are leaving an empty house, do you require vacancy permits?
- If you are conducting sales, do you require business licenses?
- What are your charitable and philanthropic considerations?

- Will you need to make arrangements for accounting, such as tax returns and change of status, record storage?
- If you are selling your possessions, what advertising and notices will you need?
- Do you have any issues with respect to chemical disposition and permits?
- Can you perform, or have help in researching lawyers, accountants, real estate agents, auction houses, technical support, etc.?
- What will your transportation needs be?
- Are there any landscaping or plants you want to keep or donate?
- Pets: will they accompany you on your journey, or will they need new homes?
- Do you have subscriptions that will need canceling or redirecting?
- Will you have cable or satellite, and a landline or a cellular phone?

Also give thought to everyday personal services to which you are accustomed and will need to replace if you move away such as:

- Hairdresser.
- Veterinarian.
- Physiotherapist.
- Coffee shop.
- Repair shops.
- Physician.
- Lawyer.
- Accountant.
- Recreation centers.
- Hobby clubs.
- Familiar places.
- Familiar faces.
- Support networks.

## 7. Downsizing Flow, from Start to Finish

Simplified, a downsizing follows this path.

- Know yourself or the individual for whom you are downsizing. (Complete the Know Yourself questionnaire in Chapter 4.)
- Know your team or that individual's team.
- Research (places and things).
- Set a goal.
- Reinforce the goal with an action or mission statement.
- Make plans (utilize the who, what, where, when and how format).
- Identify priorities.
- Make to-do lists and schedule tasks.
- Take stock and inventory.
- Commence the downsizing plan (also referred to as a personal succession plan).
- Take the task through to completion.
- Keep perspective.
- Make decisions about what to do with belongings.
- Revisit and revise plans as needed.
- Get and give help (delegate if needed).
- Attend to needs.
- Communicate.
- Obtain feedback on progress.
- Troubleshoot as needed.

The following chapters will cover the above in more detail for both the individual and the caregiver.

## 8. Putting Together Your Downsizing Team

The following is an initial list of the people with whom you should consult with and from whom you should request advice. They are the advisors who will make up your team and are your support network. For some, a fee will be required, and for others they will be compensated by the work generated if any.

They may include, but are not limited to, a number of professionals. There is more about team members in Chapter 4 (Human Resources) and Chapter 7 (Service Providers, Caregivers, and Advisors):

- Lawyers.
- Accountants.
- Financial advisors.
- Physician.
- Veterinarians.
- Bankers.
- Realtors.
- Counselors/spiritual advisors/community workers.
- Realtors.
- Home insurers.
- Caregivers.
- Storage companies.
- Downsizing companies.

If possible, meeting with and selecting team members should occur before it becomes a rushed necessity.