

Downsizing and Moving Checklist

PAPERWORK CHECKLIST

Organize Critical Documents

Before your move, gather and organize your most important paperwork. Store originals in a fireproof safe or safe deposit box, scan digital copies for backup, and let a trusted family member know where they are located.

What to Save

Names and contact information for your:

- Doctors
- Attorneys
- Accountants
- Bankers
- Investment Brokers
- Insurance Agents

Financial records, including:

- Savings accounts
- Retirement and pension information
- Certificates of Deposit (CDs)
- Stocks and bonds
- Insurance policies
- Vehicle titles
- Home ownership documents
- Boat or recreational vehicle titles

Photos or videos of valuable personal belongings for insurance purposes

List of personal liabilities and outstanding debts

Copies of federal and state tax returns from the past five years

Bank account and credit card information

Social Security card

Medicare card

Passport

Birth certificate

Wills, trusts, powers of attorney, advance directives, and any amendments

Personal letter outlining final wishes, funeral preferences, or important family information

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CHANGE OF ADDRESS CHECKLIST

Notify everyone who needs your new mailing address

Financial Institutions

- Credit Reporting Agencies
- Banks
- Investment Broker
- Insurance Companies
- Lenders
- Social Security Administration

Government Agencies

- Internal Revenue Service (IRS)
- Department of Motor Vehicles (DMV)
- Business License Office (if applicable)
- United States Postal Service (USPS)
- Medicare Office

Memberships & Organizations

- Professional Associations
- Magazine & Newspaper Subscriptions
- Civic Organizations
- Place of Worship
- Health Club or Gym
- Social or Country Clubs

Service Providers

- Accountant
- Attorney
- Cleaning Service
- Lawn Care / Landscaping
- Physicians
- Veterinarian

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PACKING CHECKLIST

Packing Tips

- Invite family, friends, or professional movers to help pack.
- Gather boxes, markers, packing tape, and labels.
- Label every box with its destination room.
- Consider specialty boxes for clothing, artwork, televisions, and fragile items.

Prepare an "Open First" Box

Include essentials you'll need immediately after arriving:

- Bedding
- Soap
- Toilet Paper
- Toothbrush & Toothpaste
- Comb or Hairbrush
- Towel
- Change of Clothes
- Plate, Cup & Utensils
- Flashlight
- Tape
- Scissors
- Cash for meals or unexpected expenses

Keep These Items With You

- Lease or Residence Agreement
- House Keys
- Medications
- Legal Documents
- Checkbook
- Cell Phone & Charger
- Address Book
- First Aid Kit
- Jewelry and Valuables

Before Moving Day

- Create a moving binder with:
 - Contacts
 - Estimates
 - Receipts
 - Inventory List
- Confirm final moving details
- Schedule utility disconnections
- Schedule post-move cleaning
- Review moving company contract and insurance coverage
- Confirm mover arrival times
- Verify payment method

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MOVING DAY CHECKLIST

- Have someone meet the movers at your new residence.
- Make sure the community manager or property office knows you're arriving.
- Finish cleaning out the pantry and freezer.
- Reduce leftover cleaning supplies.
- Review inventory lists.
- Double-check that every box is labeled.
- Ask a neighbor to watch for any mail delivered after your move.
- If moving with pets, pack food, medications, and comfort items.
- Pack a suitcase with clothing, toiletries, and medications for the first night.
- Keep valuables and irreplaceable belongings with you.
- Unpack the "Open First" boxes immediately.
- Take your time unpacking and organizing your new home.
- Ask family or friends for help if needed.