

✓ Moving Checklist

Two months before closing:

- Call moving companies for estimates; consider a senior moving manager who can help with the downsizing process
- Pass along any family heirlooms that you can't bring with you

Six weeks before closing:

- Sort out items that won't be going to your new home; begin donating them to charities, or have a garage sale
- Choose a mover and sign a contract

One month prior to closing:

- Make a week-by-week plan for packing; assign specific dates for completing rooms; set the schedule for packing at a reasonable pace
- Notify of your change of address: banks, credit cards, IRS and Social Security Administration, professional advisors (lawyers, etc.), magazine subscriptions, friends and relatives, church and clubs, post office
- Contact insurance agents to change your address and to terminate homeowners insurance at closing
- Create a file of important papers, such as birth certificates, bank statements, life insurance policies, wills and pack them in a well-marked box
- Notify utility companies of your move; arrange final readings
- Notify lawn, cleaning, snow removal and other services of your move date

Two weeks before closing:

- Contact movers to review arrangements

One week before closing:

- Pack and label your essential personal items and place them in a separate location with your important documents

Two to three days before closing:

- Reconfirm date and time with movers

✓ An SRES® professional network covers a wide variety of seniors' needs

Property	Legal and Financial	Personal
Painters	Elder law attorneys (wills, trusts, estates)	Home health-care agencies
Landscapers	CPAs or money managers	Community service contacts
Handymen	Financial planners, experts on pensions, retirement accounts	Hospitals and clinics
Certified Aging in Place Specialists (CAPS)	Reverse mortgage lenders and counselors	Public benefits offices
Clutter reduction experts	Estate liquidators	Grief counselors
Storage facilities	Tax specialists	Meals on Wheels
Interior staging specialists	Insurance agents	PACE programs
Senior moving specialists	1031 exchange specialists	Estate sale organizers
Housekeeping services	Title and escrow companies	Transitional services coaches
Charities		Dog walkers, pet boarding Community resources Volunteer