

Downsizing Checklist: Before You Move

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This checklist is organized by timeline — three months out, one month out, and one week out — to help keep your move manageable. Use it as a starting point and adapt it to your situation. Not every item will apply to every move.

Three Months Before the Move

Sorting and belongings

- Begin sorting through belongings room by room — start with lower-emotional-weight spaces first (garage, utility areas, storage)
- Identify items to give to family members and contact them early
- Decide on an approach for items to sell or donate — estate sale company, individual donations, or a combination
- Contact estate sale companies if using one; good companies book weeks or months in advance
- Arrange donation pickups for items going to Habitat for Humanity ReStore, Salvation Army, or Goodwill

Moving help

- Research and contact senior move managers or general movers — get quotes from at least two
- If using a senior move manager, schedule an initial consultation
- Book your mover once you have a confirmed move date

New home

- Measure the new space and sketch a basic floor plan
- Map out where major furniture will go so you know what fits before moving day
- Identify any accessibility modifications needed in the new home before arrival

Important documents

- Locate essential documents: Social Security card, Medicare card, insurance policies, will, power of attorney, deed or lease, financial account information
- Make sure documents are organized and will be packed separately where you can access them easily

One Month Before the Move

Address changes — government and benefits

- File a USPS change of address at usps.com/move — do this at least two weeks before your move date
- Update your address with Social Security at ssa.gov/myaccount or by calling 1-800-772-1213
- Update your address with Medicare — log into your Social Security account (this updates Medicare) or call 1-800-772-1213
- Update voter registration with your new address (requirements vary by state)

Financial and insurance

- Notify your bank and any financial institutions of your new address
- Notify your insurance providers — home, auto, life, supplemental health — and update coverage as needed for the new location
- If your property tax situation is changing, look into senior property tax relief programs in your new location

Medical and pharmacy

- Notify your primary care doctor and any specialists of your new address
- Transfer prescriptions to a pharmacy near your new home, or confirm your current pharmacy can serve you there
- Request copies of medical records if moving to a new area with different providers
- If transportation to medical appointments will change, review your transportation options ahead of time

Utilities and services

- Schedule disconnection of utilities at the current home for the day after your move
- Schedule connection of utilities at the new home for the day before or day of your move
- Cancel or transfer local subscriptions — newspaper, lawn care, housekeeping, alarm monitoring
- Notify your internet and cable provider and arrange transfer or new service

One Week Before the Move

- Confirm the move date, time, and address with your mover or senior move manager
- Pack a separate bag or box with essentials for the first night and first few days: medications, phone charger, important documents, a change of clothes, and toiletries
- Do a final walkthrough of the current home — check closets, attic, crawl spaces, and storage areas for anything overlooked
- Make sure pathways are clear in both homes for movers
- Confirm that someone will be present at both locations on move day to direct placement and answer questions

After the Move

- Do a walkthrough of the new home before unpacking to note any damage or issues
- Locate the circuit breaker, water shutoff, and any other utility controls
- Introduce yourself to neighbors when you feel ready
- Locate your nearest Area Agency on Aging — they can connect you with local services, transportation, and community programs (find yours at eldercare.acl.gov or call 211)

This checklist provides general information for organizational purposes only and does not constitute legal, financial, or real estate advice. Requirements for address changes and notifications vary by state.

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