

Rightsizing.

**How to do it the right way.**

# First, let's talk about why rightsizing may feel wrong.

The thought of reducing your possessions can raise not just practical considerations but emotional concerns. This is normal. Here are some unsettling feelings you may experience, along with some silver linings:

**“I’m sad to let go of big parts of my past.”**

Moving from one phase of life to another can open exciting new doors of discovery.

**“I’m afraid this will upset my children.”**

Actually, they’ll probably be relieved to know you’re simplifying and preparing for new life experiences.

**“This could cause some conflict with my spouse.”**

As with all issues the two of you face together, open discussion and compromise work wonders.

**“The unknown frightens me.”**

In life, change is constant and sometimes a bit scary. But it also often leads to something rewarding.





# Begin rightsizing by categorizing.

To determine which possessions you can give up, first do a thorough assessment of what you have, how often you use it, and why you still own it. Don't rush this; give yourself time to make good decisions. Here are some guidelines and questions:

- Start with the rooms in your house that you aren't using.
- List any items you know you can part with easily, and those you know are definite keepers.
- For remaining items, decide why you've kept them so long. Is it for their beauty, usefulness, sentimentality, or just habit?
- Ask yourself how often you use an item — monthly, annually, hardly ever?
- When assessing furniture, start with large pieces before smaller ones.
- Can a piece save space by serving more than one function?
- Is it comfortable, durable, easy to care for?
- Is it still appropriate for your physical condition and life stage?



# Use Acts floor plans as a space-planning tool.

If the beautiful Acts residence you choose is smaller than your present home, it's important for you to determine how many of your current possessions will fit. Acts floor plans can be a big help. The plans list all room dimensions, so you can just measure your furniture to gauge how comfortably various pieces will or will not fit. This is no time for guesswork; proper measurement is vital. Here are some tips:

- List every piece of furniture you're considering keeping.
- Measure its height, width and depth; and be exact.
- Check your measurements with the room dimensions where you might place a piece of furniture.
- Account for window placements, wall bump-outs, and other design features that affect room dimensions.
- Make sure furniture placement allows for easy traffic flow.



# Consider these space-saving guidelines.

Let's say you've determined which furniture pieces will fit into your new Acts residence. Perhaps you've identified additional items you're considering holding on to. You may still want or need to pare down your possessions further. Here are some tips for making additional reductions:

- Select furniture that is scaled to smaller spaces.
- Choose furniture and objects that serve more than one function.
- Keep pieces that have drawers and cabinets for added storage.
- Stick with fabrics and materials that are easy to clean and care for.
- Consider eliminating excessively fragile or rickety items.









or



# Group your choices as you make them.

It's helpful to group your possessions into categories as you make decisions about them. To help with this, we've included a range of colored stickers in the pocket at the back of this brochure. Place the stickers on items to mark their status. Here's an example of how you could categorize and color-code your choices:

-  Possessions you will keep and move to your new residence
-  Things you will give to family or friends
-  Items to be sold in an auction, garage sale, or estate sale
-  Things to be donated to charities
-  Trash, broken objects and other items to be discarded
-  Possessions you need more time to think about



# Help yourself feel better about parting with some possessions.

It's not easy to give up things you've owned for a long time, some objects may have special meaning or hold precious memories. There are things you can do, however, to feel better about parting with such possessions.

- Photograph special items so in the future you can remember them by looking at pictures of them.
- Give treasured possessions to family and friends, so you'll know they'll be appreciated.
- Invite family and friends to select items they would like to have.
- Donate serviceable items to charities; it feels good to know your belongings will be put to good use.
- Hold an estate sale or auction and donate the proceeds to charity.





# The right way to pack your rightsized belongings.

After methodically paring down your possessions, you'll be left with those you most want to keep and those that will fit your new residence and simplified lifestyle. The next step is preparing to move them. Taking a systematic approach will ease the task considerably.

- Start a few weeks before your move to avoid the stress of cramming at the last minute.
- Work on one room at a time, beginning with the least-used room. Spend a day or two on each room so nothing gets overlooked.
- Sort before you pack. Arrange belongings by room so they can be unpacked easily in your new residence.
- In each room, make a list of items and the order in which they should be packed.
- Collect packing materials and boxes. Pack fragile items first. Label each packed box clearly and specifically.
- Set aside clothing, toiletries and medications you'll need before you unpack at your new home.



# Better planning eases your way to better retirement living.

In addition to rightsizing your possessions, transitioning to a retirement community requires thorough planning in many other areas. You'll need to make decisions and arrangements about banking, healthcare, insurance, hiring a moving company and more. Since we've helped thousands of people move from their homes to an Acts community, we know well all the things you'll need to take care of and when. To help you stay on track and have a stress-free move, we've included a planning calendar and checklist in this brochure pocket. We hope you'll use it. The closer you follow its recommended schedule, the easier your move will be, and the more you'll enjoy the unmatched retirement living that awaits you at an Acts community.

Here are some things to  
help you stay on track and  
have a stress-free move.

## Discover peace of mind and joy of living at any of these Acts Life Care Retirement Communities.

### Pennsylvania

Brittany Pointe Estates	Lansdale	800-504-2287
Fort Washington Estates	Fort Washington	888-302-2287
Granite Farms Estates	Media	888-499-2287
Gwynedd Estates	Ambler	888-302-2287
Lima Estates	Media	888-398-2287
Normandy Farms Estates	Blue Bell	800-756-2287
Southampton Estates	Southampton	888-311-2287
Spring House Estates	Lower Gwynedd	888-365-2287

### Delaware

Cokesbury Village	Hockessin	800-530-2377
Country House	Wilmington	800-976-7610
Manor House	Seaford	800-775-4593

### Maryland

Heron Point of Chestertown*	Chestertown	800-327-9138
-----------------------------	-------------	--------------

### North Carolina

Plantation Estates	Matthews	800-582-4316
Tryon Estates	Columbus	800-633-2718

### South Carolina

Park Pointe Village*	Rock Hill	866-897-3490
----------------------	-----------	--------------

### Georgia

Lanier Village Estates	Gainesville	888-654-2287
------------------------	-------------	--------------

### Alabama

Magnolia Trace	Huntsville	866-476-7570
----------------	------------	--------------

### Florida

Azalea Trace	Pensacola	800-828-8274
Edgewater Pointe Estates	Boca Raton	888-339-2287
Indian River Estates	Vero Beach	800-544-0277
St. Andrews Estates	Boca Raton	888-601-2287

\*An affiliate of Acts Retirement-Life Communities, Inc. and not a member of the ACTS Obligated Group.



[www.ActsRetirement.org](http://www.ActsRetirement.org)





# RIGHTSIZING CALENDAR & CHECKLIST



## FIRST THINGS FIRST

Before you begin planning a move to an Acts retirement community, there are just a few preliminary steps you need to take to become a resident.

1. Contact the Life Care Consultant to select your new residence.
2. Complete and submit the Acts financial statement and supporting documentation, and receive financial approval for residency.
3. Visit with your primary care physician, who will complete the Acts medical assessment form. Meet with an Acts healthcare professional and receive medical approval for residency.
4. Make an appointment to sign your Residency Contract and meet with the Move-In Coordinator to select the finishes within your residence.

## NINE WEEKS BEFORE MOVE

### FINANCIAL

Locate a bank branch within five miles of your new residence and open new accounts if needed.

### MAIL

Complete a change-of-address form with the post office.

**TIP** ▶ Visit your local post office, or call 800-275-8777 to obtain a form. You may also complete the request online at [moversguide.usps.com](http://moversguide.usps.com)

### HEALTHCARE

If you are moving too far from your current doctor and dentist to continue regular visits, you may need to find new providers closer to your new residence. Also, locate a new pharmacy nearby.

### NOTES

## EIGHT WEEKS BEFORE MOVE

### MOVING

Request packing boxes from your moving company.

### MAIL

Order new return-address labels.

### NOTES

## SEVEN WEEKS BEFORE MOVE

### INSURANCE

Notify your insurance agent of your new address and when you will be terminating your current homeowner's policy. Consult with your agent regarding a renter's insurance policy. Inquire if your auto insurance will be impacted.

### NOTES

## SIX WEEKS BEFORE MOVE

### FINANCIAL

Provide your new address to the Social Security Administration to assure you continue to maintain Social Security and Medicare benefits and replacement cards.

**TIP** ▶ Call 800-772-1213 or visit [www.socialsecurity.gov/myaccount](http://www.socialsecurity.gov/myaccount)

### FINANCIAL

Contact your bank or financial advisor to have funds available to pay the balance of your entrance fee.

### NOTES

## FIVE WEEKS BEFORE MOVE

### MAIL

Send change-of-address cards to family and friends.

### MAIL

Notify magazine subscriptions of your new address.

### FINANCIAL

Notify credit card companies of your new address.

### FINANCIAL

Notify investment firms of your new address.

### UTILITIES

Notify phone company of your new address, and to discontinue land-line services.

### UTILITIES

Notify gas, oil and electric companies to discontinue service after you move.

### NOTES

## FOUR WEEKS BEFORE MOVE

### FINANCIAL

Transfer bank accounts or notify your bank of your new address and order new checks.

### UTILITIES

Contact your Internet provider to discontinue or transfer service the day after your move.

### UTILITIES

Contact alarm company to discontinue service the day after your move.

### NOTES

## THREE WEEKS BEFORE MOVE

### FINANCIAL

If changing banks, stop any automatic withdrawals from current bank and set up new payments through new bank.

### UTILITIES

Contact cable or satellite TV provider to discontinue service the day after your move.

### UTILITIES

Contact water company to discontinue service the day after your move.

### NOTES

## TWO WEEKS BEFORE MOVE

### HEALTHCARE

Refill prescriptions so you have enough on hand through the move. Transfer prescriptions to new pharmacy.

### MOVING

Check that you have enough boxes for all the items you plan on moving yourself. Also gather rope, twine, packing tape and plastic garbage bags.

### MOVING

Dispose of common household items that are typically not moved.

### NOTES

## ONE WEEK BEFORE MOVE

### UTILITIES

Unhook and drain garden hoses. Defrost freezers.

### MOVING

Gather and pack valuables and personal documents and separate from items that movers will take. These should travel with you for safekeeping. Include other items you will need the first day after you arrive, such as clothes, toiletries, medications, toolkit, pet supplies, paper plates, snacks, etc.

### NOTES

## MOVING DAY

### MOVING

Set aside cleaning supplies for last-minute clean-up.

### MOVING

Set aside keys, garage door openers and other items for next homeowners.

### MOVING

Unhook washer and turn off hot water heater when done. Turn off the circuit breaker.

### MOVING

Empty refrigerator.

### MOVING

Unplug electrical appliances.

### MOVING

Gather the packed items that will travel with you.

### MOVING

Do a last-minute walk-through to check windows, closets, drawers, etc.

### NOTES

# ADDITIONAL RESOURCES

As you begin rightsizing your possessions, here are some resources that could be very helpful for you:

## ITEMS TO BE DISPOSED

- 1-800-GOT-JUNK | 1800GOTJUNK.COM
- 1-800-586-5872 | collegehunkshaulingjunk.com
- 1.888.888.JUNK | junk-king.com

## ITEMS TO BE DONATED TO CHARITY

- 1-800-GOODWILL | goodwill.org
- 1-800-SA-TRUCK | satruck.org  
(Salvation Army)
- donationtown.org
- veteranpickup.org
- 1-800-775-VETS | scheduleapickup.com
- freecycle.org
- thewomensalliance.org

## ITEMS TO SELL ONLINE

- craigslist.com
- ebay.com
- ebayclassifieds.com
- services.amazon.com
- oodle.com
- sell.com
- half.com (books)

## ARRANGING A YARD SALE OR FINDING A CONSIGNMENT SHOP

- garagesalehunter.com
- yardsalesearch.com
- resaleshopping.com

## YOU DON'T HAVE TO DO THIS ALONE.

If you find that rightsizing and move planning are more than you want to handle on your own, there are companies that specialize in helping seniors transition to retirement communities. We'll be happy to refer you.

Your Acts retirement community will also be happy to provide you with contact information for local utilities, financial institutions and moving services.

375 MORRIS ROAD • WEST POINT, PA 19486 • 215-661-8330 • ACTSRETIREMENT.ORG



Acts is a not-for-profit organization pledged to the letter and spirit of U.S. policy for the achievement of equal housing opportunity throughout the nation. We encourage and support programs in which there are no barriers to obtaining housing because of race, color, religion, sex, handicap, familial status or national origin. All eligible communities are CCAC accredited.

