

Downsizing & Rightsizing Checklist

Use this page to organize the next steps without trying to do everything at once.

1. Set the Timeline

- Choose a target completion or move date.
- Limit sorting sessions to about two hours.
- Decide which rooms to handle first.
- Schedule help before you need it.

2. Create the Sorting System

- Keep
- Donate
- Sell
- Gift
- Discard
- Use one small 'unsure' area only.

3. Start With the Easy Work

- Remove duplicates and broken items.
- Gather important paperwork.
- Set aside family heirlooms.
- Digitize photographs and documents.
- Schedule donation or disposal pickups.

4. Plan Around the New Space

- Get the new floor plan and room measurements.
- Measure the furniture you plan to take.
- Confirm storage and accessibility needs.
- Decide what will not fit before moving day.

5. Build the Help Team

- Family decision-maker
- Organizer or downsizing professional
- Moving company
- Clean-out or donation service
- Realtor
- Attorney or financial professional, when needed

6. Pack the First-Two-Days Box

- Medications and toiletries
- Identification and important paperwork
- Phone, charger, clothing, and pajamas
- Bedding, towels, and comfort items
- Basic dishes, utensils, and snacks
- Keys, pet supplies, and access information

7. Before Spending Money on the House

- Ask what should be repaired, cleaned, or left alone.
- Find out whether selling as-is is a practical option.
- Confirm who has authority to make decisions.
- Speak with a Realtor before starting major updates or clean-out work.

My Next Three Actions

- 1.
- 2.
- 3.

General information only. This checklist is not legal, financial, tax, medical, or care advice.