



Senior's Downsizing Checklist

A calm, practical guide to planning a move to a smaller space with fewer decisions, less stress, and a clear path forward. Designed to support seniors and families while protecting wellbeing, timelines, and relationships.

Note: This checklist provides general information only and is not legal advice. If the estate is contested or high-value, consult a Canadian estates lawyer or licensed professional.

How to use this checklist (The Great Estate approach) • Measure first, then decide. This prevents re-sorting and second-guessing. • Work in short, focused time blocks (45–60 minutes). Stop while energy is still good. • Progress matters more than perfection. A clear plan beats a perfect one.

Suggested Timeline (Typical)

When	Focus
6–8 weeks to Moving Day	Measure, confirm must-keep items, create a floor plan
4–6 weeks out	Sort room-by-room; book donation, sale, or removal
2–4 weeks out	Pack; confirm movers; update addresses and services
Final week	Essentials box; labels; move-day and first-night plan

1) Measuring and floor plan review (start here)

- ☐ Measure rooms, closets, and key clearances (doorways, elevators, tight turns).
- ☐ Sketch a simple floor plan and assign locations for bed, favourite chair, dining setup.
- ☐ Create a short “must keep” list and a clear “not coming” list.

Watch for:

- ☐ Assuming furniture will fit — measure before committing.
- ☐ Keeping “sets” or duplicates by default (extra dishes, chairs, or small appliances).

Decisions get easier once the new space is defined

2) Room-by-room sorting strategy

- ☐ Set up staging zones: Move, Keep, Family review, Donate, Sell, Dispose, Shred.
- ☐ Start with lower-emotion areas (linen, pantry, garage) to build momentum.
- ☐ Use one box or bag in progress per category to avoid scattering.

Watch for:

- ☐ Decision fatigue — park items in “Family review” and set a decision date.

3) Sentimental vs. practical decisions

- ☐ Choose a memory limit: one shelf, one trunk, or one bin per person.
- ☐ Take photos of sentimental groupings before breaking them up.
- ☐ Agree on a family claim process (one list, one deadline, one pickup plan).

Watch for:

- ☐ Guilt-keeping. Keep meaning, not obligation.

Memories don't require any square footage



4) What to do with excess furniture and contents

- ☐ Identify large items early — they drive timing and logistics.
- ☐ Choose one path per item: family transfer, sale, donation, consignment/auction, or disposal.
- ☐ If selling, set a deadline and a fair price for a timely exit (not a perfect price).

Watch for:

- ☐ Storage as a default. It often delays closure and adds cost.

5) Moving day preparation

- ☐ Confirm the move in writing (date, scope, arrival window, insurance coverage).
- ☐ Pack an essentials box (medications, chargers, toiletries, kettle/coffee, snacks, paperwork).
- ☐ Label boxes by room and priority: 1 open first, 2 this week, 3 later.
- ☐ Do a final sweep: fridge/freezer, drawers, closets, bathroom cabinets, balcony/storage.

6) New home setup and safety

- ☐ Make the bed first; set up the bathroom and a comfortable sitting area.
- ☐ Clear walkways; improve lighting; remove trip hazards; install grab bars if needed.
- ☐ Set up phone, internet, and TV early to support routine and reduce anxiety.
- ☐ Create a “home base” for keys, glasses, wallet, mail, and chargers.

When to pause and seek professional help

- ☐ Safety risks, heavy lifting, or hazardous conditions.
- ☐ Tight timelines (sale date, tenancy end, strata requirements).
- ☐ Family conflict or stalled decision-making.
- ☐ High volume requiring coordinated sorting, packing, hauling, and setup

Field kit

- ☐ Measuring tape, painter’s tape, labels, markers
- ☐ Clear bins and zipper bags (keys, screws, remotes)
- ☐ Document folder (contacts, move paperwork)
- ☐ Gloves, flashlight, basic tools, phone charger
- ☐ Moving Boxes

Downsizing is not about loss — it’s about choosing what comes forward. With clear steps, steady pacing, and the right support, this transition can feel manageable, respectful, and even freeing.

