

## Downsizing Real Estate

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1. Have a plan for your move
  - A) Start planning at least 6 months before your anticipated move date
  - B) Why are you down sizing (health, convenience, freedom from the lawn)
  - C) Involve family members in your plans
2. Choose your professionals (movers, Realtor, auction person) wisely  
Interview several – you will become more informed about your options  
Choose people who you are comfortable with. That have your best interest at heart not theirs. Avoid “pushy or sign now!” people
3. Start “placing” important things with family members or other people or organizations you want them to go to  
Don’t wait until the last minute when you would be rushed. Take your time and be thoughtful.
4. Choose your “move to” location wisely. Consider:  
Your lifestyle  
Where family members are and how easy it will be to see them and for them to see you  
How close do you want to be to family members  
Medical facilities and Doctors that are accessible and that take your insurance  
Activities in the community that appeal to you
5. Choose your “move to” home wisely. Consider:  
To rent or buy  
Ease of upkeep  
Ease of getting around if getting around gets difficult  
Amount of space available for your important items
6. Move into your “move to” home before you totally move out of your current home  
Gives you the opportunity to see how your things will fit into your new home  
You can change your mind and exchange items until everything fits right  
Makes the move much less “threatful” and stressful.  
You can be assured that you will be able to keep everything that’s important to you
7. Make wise decisions about selling your home  
Do you really need to sell it to make this move?  
Would monthly income from turning the home into a rental be beneficial to you?  
Do you want to sell to a family member?

## TEN TIPS TO GET THE MOST \$\$\$ FOR YOUR PERSONAL PROPERTY

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1. Decide what to KEEP.
2. Decide what to GIFT.
3. Decide what to DONATE to a special cause.
4. After these decisions are made is a good time to call in an estate liquidation specialist.

Estate liquidation specialists can be found several ways:

- A) Ask your friends for recommendations;
- B) Ask your estate planning attorney for recommendations; or
- C) Check in the yellow pages of your phone book under "auctioneers" or "estate sales."

Look for someone who is licensed, bonded, and insured. Don't be afraid to ask for references.

OF NOTE: To have an estate sale at a home, the residents must be OUT of the home or be able to be out of the home for at least a couple weeks before the home needs to be cleared of all contents. Auctions can take one item or an entire estate, so it is not necessary for the resident to be out of the home.

5. If "keep, gift, donate" items are still in the home, it is helpful to MARK them so the estate specialist can easily see what needs to be sold, donated, or discarded. Easy ways to mark are with "sticky notes" or "painter's tape."
6. RESIST the temptation to throw things away before the estate liquidation specialist visits. Countless treasures have been lost for good by unsuspecting owners.
7. RESIST the temptation to sell "the good stuff" off. A professional will be able to maximize the return on ALL your items if they have a variety of quality items to sell far outweighing their commission. For instance, a car or a riding lawnmower are big ticket items that would draw potential buyers to the sale of your items who otherwise may not have shown up but may buy other items.
8. Ask to see a contract when hiring an estate liquidation specialist. They should have a preprinted one readily available for your inspection. Before signing, make sure the contract includes all of the agreements you have made with the specialist.
9. Be REALISTIC about what your items are worth. What you originally paid for an item has little bearing on what the item will sell for today. Good places to check out what things are selling for are your newspaper's classified ads, eBay SOLD items, and secondhand and antique stores.
10. ASK FOR HELP. Whether from friends, family, or professionals, most people WANT to help, if you'll just let them!

## Downsizing For Spacious Living

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### Trade Quantity of Goods For Quality of Life

Accumulating stuff is an attempt to hold on to memories and offset fears about not being prepared, or needing something later. When you eliminate something you haven't used – or even seen – in years, then two years down the road decide you need it, you can choose to reinforce the fear or LET IT GO.

Memories and preparation are fine, but you get into trouble when you cross the line from Memory Lane and Preparation Alley to Clutterville. To make a mental shift, practice these lessons:

#### Lesson 1 - Honor Your Memories:

Separate meaningful mementos from old baggage. Pull out a few key items and display them in a way that respects both the past and the present. The rest? LET IT GO.

#### Lesson 2 - Play The Numbers Game:

Draw up a list numbered 0 to 10. Start at ten and ask yourself what is the absolute worst thing that could happen to you. Keep going on to number 0...what would it be, missing a meal? Losing \$5.00? Where does your "must keep" item fit on the scale? Maybe it's at 1 ½. Not so bad to lose it after all, is it? Stuff is never the most important thing in your world. LET IT GO.

Lesson 3 - Keep A Little, Give A Lot: Pass on any underappreciated items to those who are more apt to value, honor, and use them. In other words, LET THEM GO.

#### Lesson 4 - Recycle:

Look at an old item in a new light. Can you reincorporate your memory in a modern, organized way? If not, LET IT GO.

#### **1. Call your personal Move Manager**

- It is never too early to start sorting, and **downsizing** to prepare for your move. Start with your closets and file cabinets, attics and basements.
- Begin to think about items that you would like to take to your new home.
- Start distributing things to family and friends including family mementos, photos and books. Save only those keepsakes that mean the most to you. Don't ever throw away something that has special memories, is valuable or a family heirloom.
- Get rid of anything that is not fixable, not wearable, out of date, or just taking up space.
- Begin to use up canned and frozen foods.
- Have draperies, rugs, and other linens cleaned before the move.
- Set a move date.
- Develop a **customized floor plan** with your **move manager**.
- Arrange to transfer phone, cable, newspaper, address, and other utilities. (Your personal move manager can handle these for you).
- Get a moving estimate and decide on a van line.
- Remember the more items you discard before the move the less your moving bill will be.
- Organize all medication, go through medicine cabinet and throw out anything that is expired. (Take medications with you the day of the move).
- Arrange for overnight accommodations if needed the night of the move.
- Let your **move manager** assist you with sorting and packing.
- Take a deep breath and relax...have a nice lunch with friends and family.
- Arrive at your new home the next afternoon to find everything in place....boxes all unpacked, trash discarded, beds made, pictures hung, and everything on your bedside table just as you had left it the day before!

## Take Your Memories with You

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Downsizing sentimental items, especially photos and old boxes of gifts and knick-knacks can be particularly difficult for many. However, if you take a practical approach and make time for the process, it will be easier. There are **three steps** to consider when sorting your memorabilia: **Preserve, Remember, and Share.**

### Preserve

- Digitize, Digitize, Digitize. Photos, slides, old home movies and tapes should be updated to digital format to stop the aging of old media, and make them more usable again in today's electronics.
- Purchase the best quality you can afford for any transfers. High definition over standard definition; uncompressed over compressed.
- Sort quickly with a goal in mind to take the emotion away; e.g., narrow your pile of photos to 100 childhood photos. Keep the best of the shots when two are similar. Find all photos for each child to pass along to their family. (Have the best of the best digitized for your use before passing them along.) Throw away scenery photos that have no meaning.
- Safely store – dark, dry, no extreme temperatures - and seal the original media in proper wrappings for updating to new media formats in future years. Media types are sure to change (remember 8 track tapes?), and it is best to use original materials when possible. If you can't keep it with you, send to family members.
- Use professional preservation for textiles, wedding dresses, and antiques that need special attention.
- Take photos of items that won't go with you such as a formal dining room set, special furniture items, or even items like dolls, crystal or china. Create a storybook or memory album that includes the story about the significance of these items in your life.

### Remember

- Use a digital audio recorder as you sort through items to capture memories and stories.
- To remember more, write letters to grandchildren telling them your favorite family stories, hopes and dreams.
- To get someone to write their story, send an e-mail one question at a time Use prompts and open ended questions based on the story you want to know about (Dad, I remember when you used to tell me about....).
- Attach short stories and identification to photographs for files or storybooking.

### Share

- Use it or Lose it. Anything in the garage, attic, basement or back of the closet you haven't seen in more than a year needs its purpose identified. Then, use it or lose it.
- Make copies of digital files. They are inexpensive, easy to do and it means you have a back up in case anything happens to your copy.
- Load digital frames with digital photos for a gift or to enjoy at your desk.
- For special events and family history, have a professional DVD created highlighting your life and family values.

### Other Ideas

- Schedule your time, and create a special place, such as sorting through boxes of photos for an hour after dinner in the living room.
- Sentimental and emotional items without purpose are about the story and memory, not the thing.
- Know your excuses and confront them. When you understand the emotion you can create a solution.
- Online assets and storage should be for archive, sharing and redundancy. Compressed formats used online are not your best quality for long term preservation of media.
- Computer external hard drives, disks and digital storage need to be used. Be sure to look through the computer folders, open some of the files and run the