



Moving and Downsizing Guide

The Encore team is here to help make your move manageable and stress-free!

This worksheet will break down your move into manageable, bite-sized pieces. Please take a moment and identify tasks you feel comfortable completing, along with the ones where you may want some help. Then show it to your Encore advisor and we'll help you identify resources, such as a spouse, relative, or perhaps hiring a professional moving advisor.

Remember, we have helped hundreds make the same kind of move, and we're confident we can help you find solutions that will work in your unique situation.

Adjusting to your new home	Feel comfortable ✓	Ideas welcome ✓	My plan/ next step
Finding new doctors and other health professionals			
Meeting neighbors and future friends			
Introducing friends to your new home			
Having family over			
Getting to know your new neighborhood (church, shops, banks, etc.)			
Other:			
Other:			



clearbrook inn | country meadows | laurel cove
northwoods lodge | regent court | the ridge

Moving and Downsizing Worksheet

Downsizing	Feel comfortable ✓	Ideas welcome ✓	My plan/ next step
Knowing what you need to keep (taxes, bank statements, etc.)			
Choosing what you want to keep (furniture, possessions, etc.)			
Items for family			
Items to donate			
Deciding what to do with what's left (estate sale/other options)			
Other:			

Making the move	Feel comfortable ✓	Ideas welcome ✓	My plan/ next step
Selecting a moving company			
Getting help from friends and family			
Determining if extra storage is needed			
Canceling utilities and services			
Changing address and phone numbers			
Other:			

Selling the home	Feel comfortable ✓	Ideas welcome ✓	My plan/ next step
Selecting a real estate agent			
Setting the home price			
Determining if improvements are needed			
Staging the home			
Letting go emotionally			
Other:			

Notes:
