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wealth & wisdom  
from generation  
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## Downsizing 101: Getting Ready for the Transition

The saying goes “One man’s trash is another man’s treasure.” When it’s time to downsize your home, you are the sole decision maker on what is truly valuable to you and what you may wish to give away to family or charity.

Previously, we wrote about disposing of tangible personal property including donating to charity, and the care and handling of your valuable possessions. Today we address the suggested action steps to get you ready to relocate or transition to a smaller place – whether you are selling the “Big” house up north or moving into a retirement lifestyle community, downsizing can be very challenging. The hardest part is getting started, and for some that can be psychologically overwhelming. You will need the support of family, friends and a great moving company.

### **Downsizing 101**

- Create three lists: One - The “I’m never getting rid of this stuff” list. Two - The “I would really like to keep this stuff” list. Three – “Oh, I still have this old thing” list – (AKA It’s about time you donate this stuff to charity list!).
- Next, redo the lists three times and

remove 10% of the items on lists one and two.

- Design a floor plan – Where exactly are you going to put all the “stuff” in your new place? Make one last pass over your lists. If you were moving to Hawaii and you could only pack a certain number of items, what would you leave behind?
- Photos, memorabilia, historical documents, etc. – Organize, categorize and simplify. Possibly scan and save on digital media the items that you cannot discard. This can take years, so get started now. Make it a hobby, hire a professional organizer or enroll a friend or family member to help.

**You may find our prior articles on preparing for an emergency, important papers, medical records and pet care plan to be useful. For more information, visit our website at [www.probate-florida.com/Estate-Articles.aspx](http://www.probate-florida.com/Estate-Articles.aspx)**

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*Ed Wollman is a FL Bar board certified wills, trusts and estates attorney with 26 years experience practicing in the state of FL.*

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