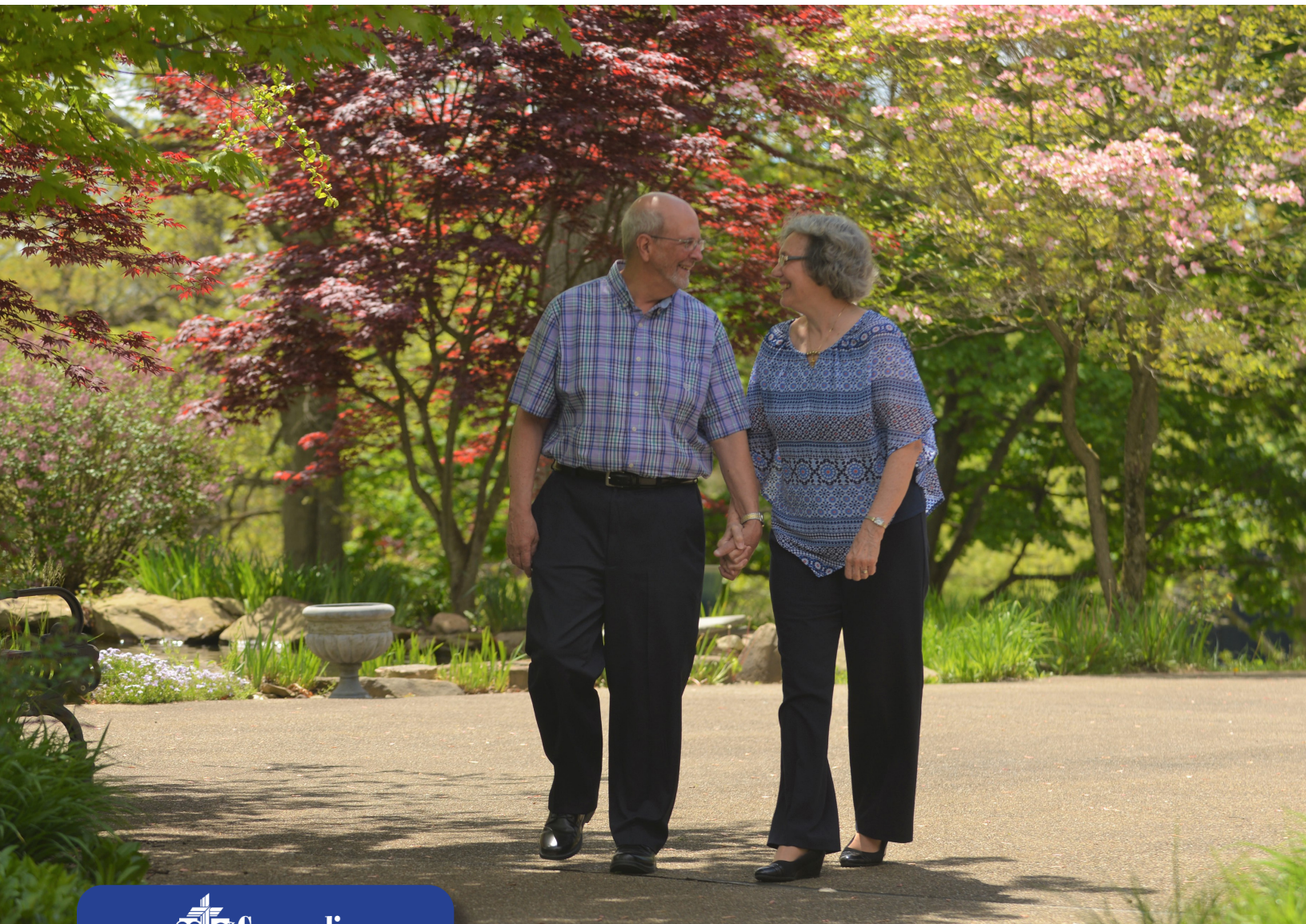




Preparing for Your Move Into a Senior Living Community



If you or a loved one will be moving into a senior living facility, there are many things you must do to ensure that the move goes smoothly. Whether moving to an independent living facility, long-term nursing care or personal care home -the checklist below will help you get headed in the right direction.



Determine How Much You Can Bring With You

Determining how much storage and space you or your loved one will have is an important place to begin. While downsizing is almost always guaranteed, an individual moving into their own apartment in an independent living facility is likely to have far more space than someone moving into a shared room in a personal care home. So that you and your family do not feel rushed, find out the size of each room in the apartment, or the amount of storage, closet spaces, and dresser drawers available in each room. Even if moving into a shared room in a personal care home, you may have the option of adding an additional dresser or comfortable reclining chair.



Make a List of the Essential Must-Haves

Now that you have determined how much space is available, it is time to begin downsizing. This will be easier to achieve if you have already determined what is most important to take with. Keep in mind some new investments may need to be made, such as organizational tools designed for small spaces, and furniture that does not overwhelm smaller spaces. Start by making a checklist of items you or your loved one needs—as well as many items that provide the comforts of home. This includes:

- **Year-Round Clothing**—Undergarments, outerwear, socks, shoes, bathrobe, coat, seasonal clothing, etc. Consider under-the-bed storage for seasonal clothing.
- **Furniture**—Start with the essentials: bed, nightstand, lamp, dresser, couch, coffee table, kitchen table. If there is room for more, go from there.
- **Housewares**—Kitchen necessities, bathroom essentials, cleaning supplies. If a full kitchen is not available, inquire about adding a mini-fridge, coffee pot, microwave and/or toaster oven.
- **Comforts of Home**—Photographs, knickknacks, decorations, quilt, throw pillows, holiday decorations, etc.
- **Personal Interests**—Television, radio/music, computer, art and craft supplies, hobby supplies, board/card games, sporting gear, etc.

Begin to Downsize, and Set Aside Important Documents As You Go

Downsizing can be an emotional experience because it requires sorting through memories. This is why it is important to first make a list of essentials as mentioned in the step above, before you begin.

Don't forget to set aside important documents such as:

- **Birth Certificate**
- **Social Security Card**
- **Mortgage Records**
- **Financial Information**—banking info, credit card information, pension/401k info, current monthly bills, etc.
- **Estate Plan**—if you have not yet created an estate plan, now is the time.
- **Medical Records**

If you have not already done so, now is also the time to consider distributing, or documenting whom you want heirlooms and property to go to. This can be documented as part of your estate planning. To help with downsizing, consider hosting a garage sale—or calling a local non-profit to remove items for donation.

Find a Reputable Moving Company

Whether you are moving into a small studio or one bedroom, or a shared room in a personal care facility, it may be easier to transport your belongings with a professional mover. If needed, you can even have a moving company pack fragile items such as dishes, to ensure they arrive in one piece. If the senior living community you are moving to is local, ask if they have any preferred moving companies that offer a discount for prospective residents.



Submit a Change of Address and Identify Your New Phone Number

The next thing you want to do is consider how you want to handle your change of address. For example, if you or your loved one will be moving into an independent/retirement living facility, you may opt to do a general change-of-address form. However, if you will be moving into a shared home or group facility you may choose to have sensitive information, such as financial information, sent to a trusted friend or family member—and more casual mail such as magazine subscriptions sent to your new address. Don't forget that it is always best to directly inform your bank, healthcare provider, and financial-related providers of your new address and phone number, even if that mail is being sent elsewhere.



Learn About Activities Within Your Senior Community and Around Your New Home

There are many benefits to moving into a senior living facility; one of many being that there is an itinerary of events that you can participate in, if you so choose. Prior to moving in, familiarize yourself with the activities you would enjoy most. This could be signing up for weekly trips to the movies, the mall, grocery store, or local events. Also check to see what group activities are available within your new home, such as card games, exercise classes, or a book club. By learning what is offered, it can make the transition easier and will make building your social circle faster and easier.

The tips above can keep you and your family organized and help to ensure that your new home is comfortable.

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