



CURATED FOR
SENIORS
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FREE PRINTABLE GUIDE

Downsizing Conversation and Decision Guide

A calmer way to make move and decluttering decisions

Introduction. Downsizing is not simply a sorting exercise. It combines practical decisions with memory, identity, time pressure, and family relationships.

How to use this guide. Choose one manageable area, agree on the decision categories, and use the closing steps to protect important papers and complete each handoff safely.

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Set a small scope

A few practical points to keep in mind.

- ☐ Choose one room, category, or deadline.
- ☐ Agree that the older adult has a voice in personal possessions.
- ☐ Set aside items that need a family, donation, recycling, or disposal decision.
- ☐ Schedule short sessions rather than one exhausting day.

Sort in stages

A few practical points to keep in mind.

- ☐ Make keep, share, donate, recycle, and decide-later groups.
- ☐ Photograph meaningful items before deciding if that helps.
- ☐ Use a qualified service for hazardous, heavy, or valuable items.
- ☐ Pause when the process becomes emotionally difficult.

Close the loop

A few practical points to keep in mind.

- ☐ Assign one person to each next step.
- ☐ Record pickup, donation, or disposal dates.
- ☐ Keep important documents and valuables secure.
- ☐ Review the plan before committing to a move or sale.

What to do next

Choose one next step you can complete this week. A small action is more useful than a perfect plan that never starts. Keep this guide with the notes or contact information needed for the next conversation.

Important note: *This guide is general information, not financial, legal, tax, valuation, moving, or estate advice. Use qualified professionals for appraisals, contracts, taxes, hazardous or heavy items, and disposal; protect original documents and valuables and verify local requirements independently.*

This is general information for preparing a conversation or next step, not individualized professional advice.

Notes and what to buy
