



Michael P. Bertrand, Founder

Senior Living Moving Checklist

Helping You Make the Right Choice with Confidence

Save Time. Reduce Stress. Simplify Decisions.

Choosing the right senior housing or care option for your loved one can be overwhelming. This checklist is designed to:

- Save you time by streamlining your evaluation process.
- Reduce your stress by giving you clarity and confidence.
- Simplify a complex decision into actionable steps.

We understand the challenges family caregivers face and we're here to help you navigate this journey.

Take the Next Step Today

This checklist is designed to help you once you've found the best housing or care solution for your loved one. If you feel as if you need additional guidance, **book a free 30-minute consultation call [here](#).**

You're not alone - we're here to help.



NewDirections

SENIOR LIVING MOVING CHECKLIST

Paperwork

☐ **Organize important documents.** First, place important information in a safe deposit box or fireproof safe. Second, scan vital documents and store them online. Third, tell your loved ones where they can find, and how they can access, the following vital documents.

☐ Names, contact information, and brief descriptions of your doctors, attorneys, accountants, bankers, brokers and insurance agents

☐ Personal assets, including savings accounts, pension or retirement plan income; CDs; stocks; bonds; insurance policies; titles to cars, boats, homes, etc.

☐ Pictures or videos of your personal possessions; including the approximate values of treasured possessions can be helpful in the event of an insurance claim

☐ List of any personal liabilities

☐ Copies of federal and state income tax returns from the past five years

☐ List and account numbers of checking accounts, savings accounts and credit cards

☐ Social Security and Medicare cards, passport, and birth certificate

☐ Trusts, wills, and any codicils or amendments, including durable power of attorney and advance directives

☐ A letter addressing any personal issues (e.g., your preferences for any end-of-life desires such as burial or cremation, any personal comments to friends or family)

Healthcare Considerations

☐ **Make an appointment with your existing primary care physician.** Once you've signed a contract with a senior living community, one of the first things you should do is pay a visit to your primary care physician. Use this opportunity to get a physical checkup, obtain copies of your up-to-date medical records, and speak with your doctor about your upcoming move. Bring any paperwork that your community needs filled out and signed by a doctor. This should include an updated medication list with directions..

☐ **If you're moving to a new geographical area, find a new primary care doctor.** If your senior living community is not nearby, your current doctor may be able to provide a referral to someone in your new area. There are also plentiful resources online. To avoid a delay in receiving medical care, make sure to plan appointments and follow up to confirm dates before your move.

☐ **Get your medications in order.** First and foremost, check with your community to see if they accept bottled medication. If this is the case, you will fill your loved one's prescriptions ahead of time and provide them to the community nursing staff upon move-in. If they do not accept bottled medication, it likely means you will be going through your community's pharmacy. In this case, the forms your doctor fills out will include prescription information, and your community will work with their pharmacy to get the medications to your loved one. Through medication management, all of your loved one's prescriptions will be administered by the nursing staff on the required schedule.

☐ **Plan for other health and medical needs.** Make sure to find specialists such as eye doctors, back specialists, dentists or anyone else you'll need to see in your new area.



Select an Appropriate Moving Company

- ☐ **Seek recommendations from your senior living community.** Since senior living communities regularly manage resident moves, they likely maintain a list of local moving companies. Some of these companies may specialize in senior living and other senior moves, making them a valuable resource.
- ☐ **Obtain cost estimates.** Understand the full scope of each moving company's contract. Clarify what's included and identify any additional costs. Budgeting for moving expenses is crucial during this transition.
- ☐ **Check online reviews.** Reading online reviews is an excellent way to assess a moving company's quality. Real customer experiences can help you decide if a particular company aligns with your needs.
- ☐ **Confirm availability on your move-in date.** Before finalizing your choice, ensure that the moving company you select is available on your planned move-in date. Avoid last-minute surprises by verifying their availability early in the process.
- ☐ **Verify licensing and insurance.** It's essential that your chosen moving company holds proper licenses and insurance. This applies both to the state you're moving from and, if applicable, the state you're moving to. Address this detail early to prevent any complications.
- ☐ **Assess handling of heavy or specialty items.** If you have bulky furniture or specialized items (such as a hospital bed), check if the moving company has the expertise and care necessary to handle them safely.

Packing

- ☐ **Consider retaining a senior living moving specialist.** These specialists can guide you through the entire moving process. They'll assess your loved one's current home, measure the new living space, and help decide what to bring and what to leave behind. If certain items won't make the move, they can assist with estate sales, donations, and long-term storage. Additionally, they handle coordination with the moving company, packing, unpacking, and even staging the new apartment. While their services come at a cost, the stress they alleviate is often well worth it for families.
- ☐ **Start early to find a home for items you're not taking with you.** Now's the time to give books to the library; to find out if your children want any of your items; to see if the consignment shop will take the extra chairs. Try antique dealers, consignment shops, yard sales, non-profits, etc. Also, begin using up canned goods and items in your freezer. If you have too many items, consider donating them to the local food pantry.
- ☐ **Prioritize essential items.** Start by packing necessities - things like toiletries, medications, clothing, bedding, and essential furniture. Then focus on items your loved one will use regularly, such as books, movies, knitting supplies, or other forms of entertainment. If their new living space includes a kitchen, pack a few pots, pans, and dishes, but avoid overpacking.
- ☐ **Clearly label furniture.** Make the moving process smoother by labeling your loved one's furniture. Use clear designations for what needs to be moved, what should go into storage, what can be sold or donated, and what should be discarded. This organization benefits both your planning and the moving company's efficiency.



Packing (Continued)

☐ **Secure family heirlooms and expensive jewelry.** To prevent any losses, store valuable items like family heirlooms and expensive jewelry in a safe place. If some items are irreplaceable, consider finding affordable duplicates to keep with your loved one, such as wedding rings.

☐ **Make a floor plan.** Ask your community representative for a floor plan of your new home. This will allow you to visualize where your furniture will fit and prevent you from taking too many pieces with you.

☐ **Ask for a list of items the community will provide.**

☐ **Ask for community rules.** Are any items prohibited?

Logistical Items

☐ **Set up mail forwarding with the US Postal Service.** To ensure that no mail gets lost during the transition, use the USPS's online tool to set up mail forwarding to your loved one's new address. If your community can collect mail before the move-in date, arrange for forwarding to begin about a week ahead of the move. Coordinate with the community's front desk or concierge to hold any mail or packages until move-in day.

☐ **Plan utility service cancellations.** Contact the utility companies for your loved one's old home and schedule cancellations right after the move. While most senior living communities include utilities, if not, plan to transfer services to the new community.

☐ **Update necessary parties about the change of address.** Create a list of everyone who has your loved one's old address on file. Reach out to each one individually to provide the updated community address. This includes creditors, insurance companies, healthcare providers, lawyers, financial services, subscription services, shopping websites, and the Social Security Administration.

☐ **Organize your loved one's schedule and community contacts.** Program your calendar with important events at the community, such as laundry days, housekeeping, hair salon appointments, social activities, and wellness classes. Save community contacts in your phone for easy access. This way, you'll always be just a quick call away from nursing staff, wellness support, maintenance, and the concierge team.

☐ **Address end-of-life planning.** While it's not a pleasant topic, it's crucial to plan for end-of-life details. Consider estate planning, living wills, Do Not Resuscitate (DNR) orders (which require a doctor's signature), and power of attorney designation. Share this information with the community as well.



It's Time to Move

☐ **Have a “Day of the Move” Box.** Set aside items that you will need the day of the move: an overnight bag with a change of clothes and personal items (toiletries, medications); important papers; bedding; basic tools (screw driver, hammer, flashlight); cleaning supplies (sponges, paper towels, soap). Also include whatever form of payment the moving company requests; most will not accept a personal check.

☐ **Confirm the completion of all paperwork.** Reach out to the community and verify that all necessary paperwork has been signed and received. By now, you should have filled out and submitted all pre-move-in forms. This confirmation will provide peace of mind and save you from any last-minute form-filling hassles.

☐ **Obtain new contact information.** Determine how your loved one will stay connected. Will they use a landline at the new community? Do they already have a cell phone, or will you be acquiring one for them? Create a clear plan for communication and ensure that everyone involved understands it.

☐ **Ensure emergency preparedness.** If your loved one has mobility challenges or is at risk of falling, having an emergency pendant is crucial. These pendants allow them to contact emergency services with a simple button press if no one else is around. Check with the community to see if they provide such pendants, or consider purchasing one externally.

☐ **Secure gate codes.** If your senior living community is part of a larger campus, there might be gated access. Inquire about gate codes - some designated for your loved one, others for moving companies, and perhaps additional ones for family members. Store these codes securely, whether in your phone or another reliable location.



Change of Address Checklist

- ☐ Utilities & Services
 - ☐ Electric
 - ☐ Gas
 - ☐ Water/sewer
 - ☐ Trash/garbage pickup
 - ☐ Telephone (landline)/mobile
 - ☐ Cable/internet
- ☐ Fuel
- ☐ Water delivery/water treatment
- ☐ Pool service
- ☐ Lawn/garden services
- ☐ Housecleaning services
- ☐ Physicians and/or veterinarian
- ☐ Attorney
- ☐ Financial and personal accounts
- ☐ Banks
- ☐ Loan institutions
- ☐ Credit card companies
- ☐ Other charge accounts
- ☐ Insurance agencies (health, home/life, auto)
- ☐ Pension plans
- ☐ Air miles rewards program
- ☐ Accountant/tax consultant
- ☐ Professional memberships/licensing boards
- ☐ Government and public offices
- ☐ Post office
- ☐ Veteran Affairs
- ☐ Income Tax/IRS
- ☐ Family support
- ☐ Social Security
- ☐ Unemployment insurance
- ☐ Vehicle registration
- ☐ Driver's license
- ☐ Subscriptions
 - ☐ Newspapers
 - ☐ Magazines
 - ☐ Mail order houses
 - ☐ Book and music clubs



NewDirections

NOTES