



The Golden Years Relocation Plan

and Downsizing Checklist

A practical, compassionate workbook for retirees, families, and adult children planning a smaller home, a new community, or a move closer to the people who matter most.



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1. Start With a Plan That Puts People First

A new chapter can still feel like home

Moving after decades in one home is about more than furniture. It can involve family history, changing routines, important records, mobility considerations, and a lot of decisions in a short period of time.

The goal is not to rush through the past. It is to make thoughtful space for the future.

Use this workbook to move from “Where do we start?” to a clear plan for sorting, preparing, moving, and settling in. If you are helping a parent, keep them involved in the decisions that shape their new home. If you are planning your own move, give yourself permission to work in small steps.

Key takeaways

- Start early and work in manageable sections rather than trying to complete the whole home at once.
- Make decisions with your parent or loved one, not for them.
- Use the new home’s measurements and floor plan to guide what comes along.
- Protect daily routines, medications, important documents, and familiar comfort items.
- Bring in professional help when packing, lifting, transport, or timing becomes too much to manage alone.

The family rule:

The person moving should have a voice in what stays, what goes, and what the new home feels like.



Before you begin

- » Name the reason for the move in one sentence: _____
- » Identify the target move window: _____
- » Confirm the destination and collect a floor plan, measurements, and access details
- » Decide who needs to be involved in decisions, updates, appointments, and moving-day support.
- » Create one shared place for estimates, contracts, records, receipts, inventories, and contact information.

2. Your Relocation Timeline

A simple plan for the weeks ahead

Every move is different. Use this timeline as a starting point, then adjust it for the destination, the size of the home, the amount of downsizing, and any care or housing deadlines.

Timing	Priorities	Done
12–8 weeks before	Have the first conversation. Confirm the destination and move window. Gather the floor plan and measurements. Start a moving budget. Identify family, senior move management, or professional moving support.	☐
8–6 weeks before	Begin with low-emotion areas such as a pantry, linen closet, utility room, or garage. Create keep, family, donate/sell, and recycle/discard zones. Set a deadline for relatives to collect items.	☐
6–4 weeks before	Work room by room. Photograph sentimental items that cannot move. Schedule an in-home or virtual moving estimate. Discuss packing, transport, storage, valuation coverage, and delivery needs.	☐
4–2 weeks before	Finalize what is moving. Arrange donation, sale, recycling, or disposal. Confirm access at both homes, including elevators, parking, stairs, and narrow doorways. Begin packing nonessential items.	☐
2–1 weeks before	Update addresses and services. Transfer prescriptions and medical records as needed. Pack documents, valuables, medications, chargers, and a 72-hour essentials bag separately from the shipment.	☐
Moving week	Reconfirm the crew, dates, arrival windows, payment method, inventory process, and contact information. Keep the new-home floor plan available for furniture placement.	☐
Moving day	Complete a final walkthrough. Keep personal essentials with you. Review the inventory with the Atlas® Van Operator. Protect clear paths and allow the person moving to stay somewhere comfortable during the busiest hours.	☐
First 72 hour	Set up the bedroom and bathroom first. Reconnect key devices. Place familiar items. Confirm medications, meals, mobility needs, and follow-up support.	☐

Your move team

Role	Name	Phone or Email	Responsibility
Primary family contact			
Moving coordinator or agent			
Senior move manager or organizer			
Real estate or community contact			
Family member at destination			

Planning Tip: A written timeline gives everyone the same source of truth and helps turn a stressful transition into a series of smaller decisions.



3. Downsizing with Dignity

Sort the belongings. Keep the meaning.

Downsizing is not a contest to see how much can be discarded. It is a process of deciding what supports the next stage of life, what should be passed on, and what can be remembered in another form.

Start with one drawer, shelf, or small section. Stop before the process becomes exhausting. Progress is more sustainable when there is time to pause, talk, and remember.

The four-category sorting system

Category	Use it for	Helpful question
Keep	Items used regularly, needed for daily routines, or essential to the new home.	Will this support the life we are building next?
Pass to family	Heirlooms, photographs, collections, or meaningful items someone has agreed to receive.	Who genuinely wants this, and when will they take it?
Donate or sell	Useful items that no longer fit the space, routine, or lifestyle.	Could this help someone else more than it helps us now?
Recycle or discard	Broken, unsafe, expired, or unusable items.	Is this safe, functional, and worth the space it requires?

Five questions for difficult decisions

1. Is it used, loved, or needed in the new home?
2. Does it fit the new space, including doorways, elevators, and walkways?
3. Is it safe and comfortable to use?
4. Does someone in the family want it now—not someday?
5. Can the memory be preserved through a photograph, scan, note, or story?

Family conversation starters

Use these prompts to keep the conversation collaborative:

- “What would make your new home feel most like yours?”
- “Which parts of the current home or routine do you most want to carry forward?”
- “Would you like to decide together, or would you prefer to lead this room?”
- “Is there anything you want a family member to receive while you can tell them why it matters?”
- “What would make moving day feel more comfortable?”



The Memory-First Approach:

Before parting with a meaningful item, take a photograph, record its story, or write a short note about who owned it and why it mattered. The object may be leaving the home; the memory does not have to.

Downsizing progress tracker

Area	Started	Finished	Next Step
	☐	☐	
	☐	☐	
	☐	☐	
	☐	☐	
	☐	☐	

4. Room-by-Room Checklist

Make the new space work for everyday life

Before packing, compare the current home with the destination. Prioritize clear walkways, easy access to daily-use items, comfortable seating, and the familiar objects that help the new space feel welcoming.

Living room and family spaces

- Measure the furniture that is most comfortable and meaningful.
- Choose seating that supports safe, easy movement.
- Select a few familiar anchors: a favorite chair, family photos, artwork, or a well-loved quilt.
- Decide what will be placed first so the new room feels familiar quickly.

Kitchen and dining

- Keep the dishes, cookware, and appliances used in the new routine.
- Remove duplicates, expired food, and items that are difficult or unsafe to handle.
- Identify the first meals and basic supplies needed after arrival.
- Set aside special pieces that should travel with personal essentials if they are too valuable or fragile for standard packing.

Bedrooms and closets

- Prioritize the bed, linens, clothing, shoes, and daily-care items needed immediately.
- Create a clearly labeled 72-hour bag for each person.
- Separate items that need family decisions before donation or disposal.
- Label boxes by room and note any special handling instructions.

Bathrooms and linens

- Pack medications and health-related essentials separately from the shipment.
- Keep a first-night supply of toiletries, towels, toilet paper, and basic cleaning items.
- Remove expired products and duplicate linens.
- Confirm accessibility needs in the new bathroom before moving day.

Office, records, and personal papers

- Keep identification, financial records, contracts, medical information, and moving documents with you.
- Shred sensitive papers that are no longer needed.
- Create a digital backup of important records when appropriate.
- Label the document folder “Open first” and keep it out of the moving shipment.

Garage, attic, basement, and storage

- Sort early; these areas often hold the most volume.
- Safely dispose of items movers cannot transport, including many flammables, aerosols, paints, fuels, and propane tanks.
- Return borrowed items and identify anything that belongs to another family member.
- Decide whether seasonal or sentimental items need storage instead of an immediate place in the new home.

New-home fit check

- Measure doorways, hallways, stairwells, elevators, and tight turns.
- Mark furniture placement on the floor plan before loading begins.
- Plan clear paths from the entry to the bedroom and bathroom.
- Identify where mobility aids, chargers, medications, and frequently used items will live.
- Share the floor plan and room labels with your moving team.

Pro Tip: A smaller home should feel intentional, not crowded. Keep the pieces that make daily life easier and the details that make the space feel like home.



5. Logistics and Moving Day

Choose the right level of support

There is no single correct way to move. The right option depends on the distance, time-line, amount of downsizing, physical demands, and how much time the family can realistically give to packing and coordination.

Moving Approach	May fit when	Questions to ask
Self-packing	The household is manageable, the time-line is flexible, and family members can safely pack and label items.	Who will handle heavy, fragile, or oversized pieces?
Partial-service support	The family wants to pack some items but needs professional help with loading, transport, specialty items, or selected rooms.	Which rooms or belongings should professionals handle?
Full-service or white-glove support	The move includes a large household, fragile or sentimental belongings, a tight schedule, physical limitations, or a family that cannot manage the heavy lifting.	Does the plan include packing, protection, transport, placement, unpacking, debris removal, or storage options?

What to discuss with your Atlas® agent

Atlas [residential moving services](#) can be tailored around the move, with options that may include a personalized in-home or virtual estimate, professional packing and unpacking, careful transport, and storage when move dates do not line up. Ask your local Atlas agent which services are available for your route and needs.

Families may also ask about Atlas® crew screening through the No Stranger in Your Home® commitment, valuation coverage options, inventory procedures, delivery timing, and how furniture and boxes will be placed at the destination.

Address change and services tracker

Category	Organization Service	Date notified	Confirmed
Government	USPS change of address		☐
Government	Social Security or other benefit providers		☐
Healthcare	Medicare, physicians, specialists, pharmacy		☐
Financial	Banks, credit cards, retirement accounts		☐
Insurance	Home, renters, auto, life, health		☐
Home services	Electric, gas, water, trash, internet		☐
Community	Senior living or neighborhood contacts		☐
Subscriptions	Shopping, deliveries, memberships		☐



Moving day checklist

- ☐ Keep medications, documents, valuables, chargers, and a change of clothes with you.
- ☐ Complete a final sweep of closets, cabinets, attic, garage, basement, yard, and storage areas.
- ☐ Review the inventory with the Atlas® Van Operator and note existing condition details.
- ☐ Confirm fragile, high-value, or special-handling items before loading.
- ☐ Protect floors, walls, doorways, and high-traffic areas.
- ☐ Keep the person moving somewhere comfortable during the busiest loading and unloading periods.
- ☐ Share the destination floor plan and room labels with the crew.
- ☐ Confirm who will be present at the old home and the new home.

Pro Tip: Need help turning this plan into a move-day schedule?

Request a free, no-obligation moving quote and [talk with a local agent](#) about your timeline, packing needs, and destination access.



6. The First 72 hours and Your Next Step

Make the new space feel like home

The move is not over when the truck leaves. The first few days are about restoring comfort, routine, and confidence—not unpacking every box at once.

Set up first

- **Bedroom:** bed, linens, medications, comfortable clothing, and a reading light.
- **Bathroom:** toiletries, towels, toilet paper, shower supplies, and any safety or mobility equipment.
- **Kitchen:** water, simple meals, coffee or tea, snacks, and basic dishes.
- **Communication:** phone, chargers, Wi-Fi, emergency contacts, and key devices.
- **Familiarity:** family photos, favorite chair, artwork, music, or another meaningful item.
- **Safety:** clear walkways, working lights, accessible switches, and essentials within easy reach.
- **Connection:** a check-in plan with family, friends, neighbors, caregivers, or community staff.

Your family move brief

Use this page to make the plan easy for everyone to follow.

The person moving wants the new home to feel: _____

The three items that should be available first:

1. _____
2. _____
3. _____

Important routines to protect:

Who will be at the destination on arrival day:

Questions for the moving team:

Ready for a Move Handled With Care?

A thoughtful senior move gives families room to focus on the decisions that only they can make: the conversations, the memories, and the reassurance that comes with a familiar piece of home.

Atlas® Van Lines can help with the physical transition through personalized moving, professional packing and unpacking, careful transport, and storage options when timing requires flexibility. Your local Atlas agent can help you build a plan around the home, the destination, and the people who matter most.

REQUEST YOUR PERSONALIZED ATLAS® MOVING QUOTE

