

Rightsizing for Peace of Mind



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Agenda

- Safety First!
- Life's Transitions: Where to Start?
- Rightsizing for Your Future
- Getting Started

Safety First

... you're safe until ...
you're not



Safety First

- Complete File of Life magnet card
- Regularly check-in with someone
- Clear hallways and stairs
- Secure rugs and floor tiles
- Have ample task lighting

Emergency Medical Information Magnet

FILE OF LIFE

KEEP INFORMATION UP TO DATE !!
Review At Least Every Six Months !

MEDICAL DATA REVIEWED AS OF _____ **MO.** _____ **YR.** _____

Name: _____

Sex:
M F

Address: _____

Doctor: _____

Phone #: _____

Preferred Hospital: _____

EMERGENCY CONTACTS

Name: _____

Phone #: _____

Address: _____

Name: _____

Phone #: _____

Life's Transitions: Where to Start?

Proactive
vs.
Reactive



Life's Transitions: Where to Start?

- Start by asking “What if” questions:
 - What if I can no longer do my laundry?
 - What if I can no longer prepare a meal?
 - What if I find myself forgetting things?
 - What if I can no longer drive?
- Answers to the above will help you chart a course of action
- Identifying **what** help you may need and **when** you may need it is key

Life Transitions: Where to Start?

- Start the conversation with family, friends and physicians
- How do you wish to live going forward?
 - Age in place
 - Downsize but live independently
 - Move in with family
 - Other
- What is the shape of your home?
- What is the shape of your finances?
- Answers to the above **may** help you **evaluate** options

Rightsizing for Your Future



Rightsizing: The Papers

- Locate critical documents
- Identify bills and tax records
- Document investments and passwords
- List valuables (and where stored)
- Create list of key resources
 - Executor(s)
 - Attorney(s)
 - Financial Planner(s)
 - Insurance Agent(s)
 - Physicians
 - Others



Rightsizing: The Home

- Identify modifications needed
 - Grab bars / chair lifts / raised toilets
 - Ample task lighting
 - Talking clocks / medication alarms
 - Special lights for detectors, phone and doorbells
- Get quotes / Assess costs
- Examine alternatives



Rightsizing: The Medical

- Identify physical limitations and concerns
- Keep a list of all Rx and refill instructions
- Keep track of doctor appointments and timely follow ups
- Talk to care givers and family members



Getting Started



Getting Started: Questions

- Regardless of **when/if** you move, start by asking questions:
 - What items do you want to keep?
 - What items are you ok to let go?
 - Who will get the family memorabilia?
 - Do you have specific bequests?
 - Do you need help shredding papers?
 - Do you need help transporting donations?

Getting Started: Letting Go

- Appraisals
- Auction Houses / Estate Sales
- Garage Sale, Consignment Shops, e-bay, oh my!....
 - Who will organize?
 - Who will set-up and run?
 - When will you do it?
 - How much money do you anticipate making?
- ***Is it worth it?***



Getting Started: Making a Move

- Meet with a Realtor or 2
 - Get facts
 - Listen attentively – with a friend
 - Review your time-line
 - Sleep on it!
 - Consider a home inspection
- Review options on where to go
- Take tours of possible places
- Evaluate costs



Getting Started: Be Realistic!

- If you've lived in your home for 10+ years, be realistic on how long it may take to move out!
 - Solicit help from family and friends
 - Define the “rules of the road”
 - Delegate tasks
 - Set goals, schedule calendars
 - Checkpoint on progress



Helpful Local Resources:

- Absolute Auction & Realty
- Donation destinations:
 - GoodWill Industries
 - Salvation Army
 - The Barn Thrift Shops , Route 44, Pleasant Valley
 - Love INC
 - The Friends of Poughkeepsie Library, Boardman Road
- FreeCycle (www.freecycle.org)
- Friends of Seniors Dutchess County (friendsofseniors.org)
- Hudson Valley Concierge Services (hvconciierge.com)
- NextDoor (nextdoor.com)

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KEEP
CALM
AND
ask the
EXPERT

Rightsize today, for Peace of Mind tomorrow!



What action will you take, today?