



Downsizing 101

Your Guide to Saving **Money**,
Saving **Space** and Saving **Your Energy**

CONTENTS

“Make it Mine” - 3

Part I - Why Downsize? - 4

Downsizing may help you think more clearly - 5

Downsizing could be your chance to share your legacy - 6

Downsizing may be a safer option - 7

Downsizing may help you feel less lonely - 8

Part II - When to Downsize - 9 & 10

Part III - How to Downsize - 11

Create a Plan - 12

Choose what stays and what goes - 13

Name your price - 14

Get ready to sell, sell, sell - 15 & 16

Donate the rest - 17

Enjoy the peace of your decluttered space - 17

Conclusion - 18

“Overwhelmed is the word for it”

THIS IS HOW BROOKDALE RESIDENT MARILYN DESCRIBES HER HOME-DOWNSIZING ATTEMPTS, of which there have been several. “I’ve been downsizing for years,” explains Marilyn, who moved from California with her dog, Posh, to be closer to her family. However, Marilyn has found that downsizing to a studio apartment from a two-bedroom home has proven to be more difficult than she had ever imagined. “I was lost,” she continues. “Basically, I was overwhelmed, because when you don’t know where to put things or what to do, you just sort of move in and [leave] things where they are.” That’s why, as part of Brookdale’s *Make it Mine* YouTube series, we brought in designer Gwen to help Marilyn make the most of her new space.

Now, if you are at all like Marilyn, don’t worry, you’re not alone. And just as Marilyn had Gwen to help her, you’ve got us to help break down downsizing for you.



You can follow Marilyn’s journey and see her room renovation in season one of “Make it Mine”

Check out the first season of our “Make it Mine” YouTube series!





PART I

Why Downsize?

DONATION

1 Downsizing may help you think more clearly

HAVE YOU EVER BEEN SPEAKING TO YOUR GRANDCHILD, and instead of addressing them by their own name, you go through the names of all your children and elder grandchildren in perfect descending chronological order, hoping you'll land on the right name eventually? Alternatively, have you ever looked into your [closet](#) and gotten tired just thinking about deciding what you want to wear? If you have, you know what it's like to have a brain that is too exhausted to make a decision, and you are in good company.

THIS FEELING OF BEING TOO TIRED TO MAKE A CHOICE is appropriately termed *decision fatigue*. "Our brains are wired to make a limited number of efficient decisions each day," [according to the Brookdale Senior Living blog](#). Decision fatigue is the concept that your brain can make only so many good decisions before it tires out, switches to autopilot and makes poor choices instead. Rather than taking the necessary beat to think of the right name of something or someone, your brain calls out the name that, statistically speaking, has usually been correct. The rationale behind the benefits of minimizing decision fatigue is simple. Had there been fewer options in your closet this morning, for example, you would have had more resources available to put together a nice outfit instead of slapping



on the same old sweatsuit. However, the benefits of decreasing decision fatigue don't stop at decreasing cognitive overload. Doctors like Lisa MacLean, psychiatrist and chief wellness officer at Henry Ford Health System, identify decision fatigue as a major contributor to exhaustion, anxiety and stress — especially for seniors. "By the time the average person goes to bed, they've made over 35,000 decisions," [says Dr. Lisa MacLean](#), "and all of those decisions take time and energy, and certainly can deplete us." Luckily, the dangers of decision fatigue can be abated by a reduction in the number of decisions one must make. Who knew that by downsizing your home, you could free up mental space too? When you downsize, life and the number of choices required to live it are simplified. That way, you have more time and cognitive capacity to think about what matters to you. Maybe you will even get that grandchild's name right on the first try.

Read more about seniors and cognition in our blog



2

Downsizing could be your chance to share your legacy

SOME SAY HOME IS WHERE THE HEART IS; others say home is where your stuff is. With the truth lying somewhere between the two, decluttering a home to downsize can be quite the physically and emotionally taxing task. Where others might see clutter, you see treasures that have been carefully collected and curated for decades. But let's admit it — some of it really *is* just clutter. And because the difference between the two requires the discernment of your uniquely trained eye, don't let this be a decision others make for you. [We spoke to a few Brookdale residents](#) about what they were glad they had brought with them to their new homes over the course of downsizing. For some, it wasn't about what they brought, but what they didn't. "I didn't bring a lot of stuff," [says one resident named Ken](#). "We donated a lot of our stuff before we moved," he remarked. Another resident lamented not having brought something, and the item may surprise you: "[It was] a candy dish," [laughed Brookdale resident Maureen](#), "It's a great form of bribery!"

IN SHORT, DON'T FORGET YOUR "CANDY DISH." By downsizing, you give yourself the opportunity to decide for yourself what goes and what stays for generations to come. By downsizing, you can help ensure that the brooch your mother gave you will go to a grandchild instead of the garbage bin. What is better than the chance to create your own legacy, one "candy dish" at a time?

Read more about what residents brought to Brookdale in our blog



3

Downsizing may be a safer option



SAFETY IS OF PARAMOUNT CONCERN TO AGING AMERICANS

, but unfortunately it is of lesser concern to the builders of most American homes. As new construction tends more toward higher ceilings, steeper stairs and more stories, there are fewer and fewer options for aging Americans. [According to data collected by Harvard's Joint Center for Housing Studies](#), as of 2011, only 3.5% of housing had single-floor living, no-step entry, and wheelchair accessible extra-wide hallways and doors. Seniors who plan to downsize and move into a new house, therefore, may have fewer options to choose from. Downsizing for safety is important, and because of limited accessible housing supply, downsizing into an apartment may be the safest option. Moreover, minimalist organization can prove safer. "No one can predict when they're going to have a dizzy spell," [according to the Brookdale Senior Living blog](#), "but making sure your home is clear of clutter, stray cords and debris is a great place to start when trying to prevent an accidental fall." Recommending the organizing of items according to ergonomics, the blog continues, "Items that get daily use should be in an easy-to-access area that doesn't require uncomfortable lifting or bending." If safety is becoming a question, then downsizing may be a viable answer.

Read more home safety tips for seniors in our blog



4

Downsizing may help you feel less lonely

WHEN YOU MOVED ONTO YOUR STREET, IT WAS A COMMUNITY OF YOUR PEERS.

But with aging families staying put and young families moving and mobilizing more than ever, more and more seniors find themselves to be the novelties of their neighborhood. It is environments like these that contribute to the [social isolation](#) that 25% of adults 65 and over [report feeling](#).

IT IS IMPORTANT TO NOTE THAT LONELINESS LIKE THIS ISN'T JUST A SIGN OF A BAD DAY; it is a major health risk for aging Americans that demands notice. [According to the Centers for Disease Control](#), social isolation is associated with a significant 50% increased risk of dementia. Having few social relationships is associated with a 29% increased risk of heart disease and a 32% increased risk of stroke. And finally, among heart failure patients, loneliness is associated with a risk of death that is four times higher, a 68% increased risk of hospitalization and a 57% increased risk of emergency room visits. If you are feeling lonely, it is time to do something about it for your health.

MOVING BACK INTO A COMMUNITY OF YOUR PEERS COULD BE JUST THE FIX YOU NEED. “Loneliness promotes depression and illness,” [remarks Neva Schroder](#), Brookdale resident dancer and



instructor, describing what she calls “a plague to the elderly.” That’s why Neva and her husband, Bill, have developed their own “antidote to loneliness”: community dance classes. “We literally have seen the difference in people from when they first start and after they get acquainted [through dance]. They enter the room with a twinkle in their eye, knowing they are in a friendly place with people.” Through their weekly classes provided free to Brookdale residents, Neva and Bill Schroder help to diminish loneliness and increase liveliness in their communities, one waltz at a time. To help feel less lonely, more healthy and more happy, read on to discover how you can start downsizing today.

Read more about Bill and Neva on our lifestyle blog



PART II

When to Downsize

If you Google *downsizing*, one of the most popular queries is “At what age should seniors downsize?” Unfortunately, making the decision on when to downsize isn’t as easy as a Google search. While there is no one-size-fits-all age at which you should downsize, there are a few factors that may mean the time is right for you.



1 Your housing costs have risen above 30%

The number one draw to downsizing seems to be the extra chunk of change you can save. One [Merrill Lynch survey](#) reports that a substantial 64% of downsizing retirees transition to smaller homes to save on housing expenses. The tried and true rule for housing expenses is that you should spend no more than 30% of your gross income on it. If your housing expenses — everything from rent to electricity to renovations — exceed 30%, it is time to consider downsizing.

2 You are behind on your home maintenance

Let's face it — the lawn-care war you waged is long over, and you don't ride your lawn mower as often as you used to. What was once your pride and joy has now become a chore you no longer have the time for. Although lawn care is a less consequential form of home maintenance, if you find yourself skimping in other areas of home repair, this is a major indicator that it's time to downsize. "A senior living community eliminates costs like lawn care, maintenance, home repairs and other payments," [outlines the Brookdale Senior Living blog](#). And unlike lackluster lawns, delayed maintenance on the roof or the air conditioner unit could cost you big time. "If you make the move [to downsize] too late, your home just starts deteriorating," [explains Ben Swanson](#), top Arizona real estate agent. "Then you're going to have to spend equity to repair your house before it goes on the market." By holding on too long to a house that is no longer serving you, you diminish the value not only of your home in the present, but also the home you move into next. If your to-do list of home maintenance is getting too long, don't wait too late to downsize.

3 Your home no longer fits your lifestyle

Way back when your children roamed the home, leaving potato-chip crumbs and backless remotes in their wake, you prized the quiet retreat of the rarely visited, tucked-away corners of your home. Now that the house is mostly silent and all the sofas are sterilized, there just isn't the need for all the extra space. If you're beginning to wonder what the use is in having so much to dust just for the sake of extra square footage, then this is a sign that the time is right to downsize.

PART III

How to Downsize

You want to downsize to cut down on decision fatigue, save money and personally curate the legacy left to your heirs. You know it's time to downsize because your house, as it is, may no longer be the safest or most cost-efficient place for you to reside. Now, there's nothing left to it but to *do* it! Of course, sometimes simplifying isn't all that simple. When you have years or even decades worth of stuff accumulated, just getting started sorting through it can feel like an overwhelming chore. Fortunately, we're here to help. To learn what it takes to downsize and find today's tools to help make the process as easy as can be, keep reading.

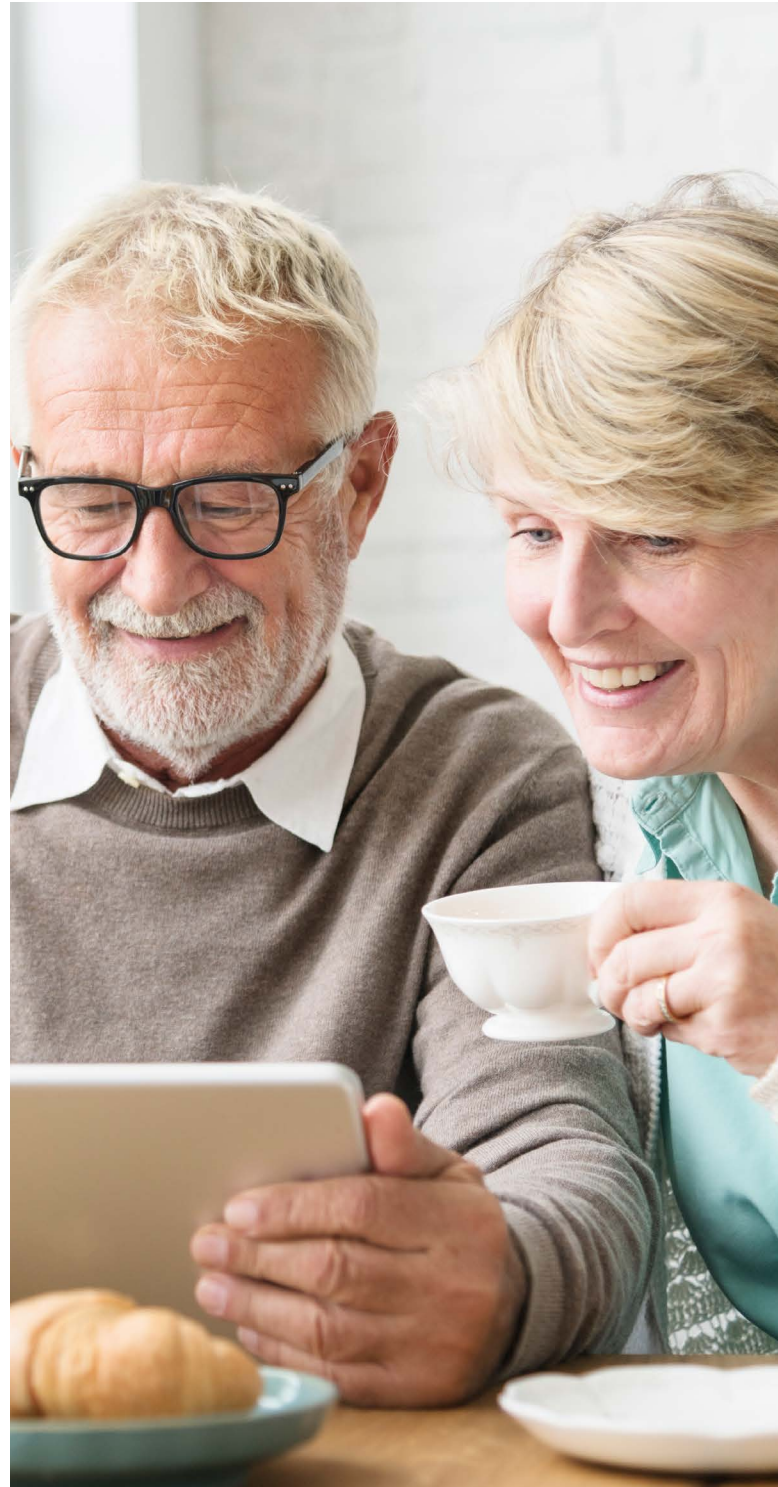
1 Create a plan

- ✓ Plan for decluttering
- ✓ Plan for selling
- ✓ Plan for moving
- ✓ Plan a budget
- ✓ Plan a timeline

YOU MIGHT NOT THINK OF A PLAN AS A TOOL, BUT TRUST US — without one, your downsizing exercise could be significantly more difficult. It should include five elements: a plan for decluttering, a plan for selling, a plan for moving, a budget and a timeline. Are you going to declutter categorically, moving from clothing to papers to sentimental items; or will you tackle it all at once using the Keep/Sell/Donate/Toss strategy? Are you going to keep some sentimental items to give to your grandchildren? Are you going to book movers, or will you be renting a box truck?

CAN YOU HIRE AN INTERIOR DESIGNER OR AN ORGANIZATIONAL EXPERT

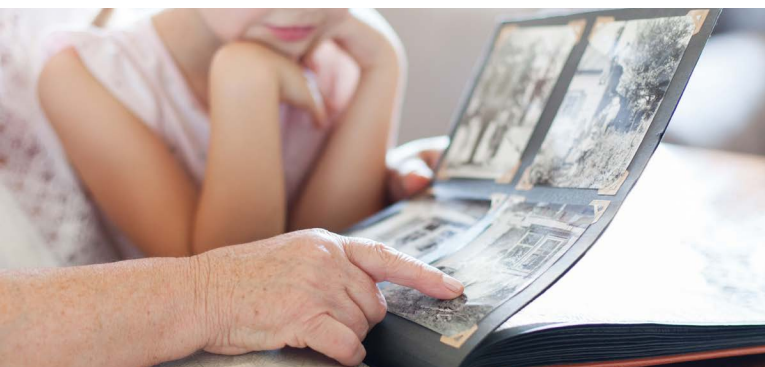
to steer you in the right direction? Will you be packing up over a few months, or will you cram it all into a single weekend? Take some time to write down what you're going to do and when, and post it somewhere conspicuous.



2

Choose what stays and what goes

FIRST, LOOK AT THE SPACE AND LAYOUT OF YOUR NEW HOME, and mentally set aside any furniture or sentimental items that you want to keep — *and* have room for. Measure the storage space and the living space in your new home too. If you don't have space for a 12-person dining room table and chairs set in your new home, it needs to go to someone who does. To help you discern what stays and what goes, here are a few tools to help.



LARGE STORAGE BOXES. Start with several large boxes and label each one either *Keep*, *Sell*, *Donate*, or *Toss*. Begin sorting through your items one room at a time, and make sure everything goes into one of the labeled boxes. Notice that there isn't a box labeled *I'll decide later*.

AN INTERIOR LAYOUT. Once you've measured the dimensions of the items you want to keep, it's time to see how they'll work in your new place. Use a floor plan to arrange furniture, lamps, TVs and

bookshelves on paper before your move. Not only will that be easier on your back, you can tell if something will work in your new space before you pay to have it moved. If you don't have a floor plan, you can go old school with graph paper, a pencil and a measuring tape, or you can use a computer program like [Floorplanner](#) to rearrange the living room virtually.

A SCRAPBOOK. If you've been in the same place for decades, odds are that you have a lot of memories in the form of photographs, playbills, date-night ticket stubs, newspaper clippings and so on. Take this opportunity to consolidate and organize all those memories into a few scrapbooks you can keep on a bookshelf. Having these special moments consolidated into a few easy-to-peruse scrapbooks not only could save you some space, it could actually help preserve them for a long time to come.

A DOCUMENT SHREDDER. As you're going through old photos and documents, not everything you come across is going to be scrapbook-worthy. As you're deciding which ones to keep and which to toss, consider investing in a document shredder to dispose of anything that contains personal information. Taking a few extra minutes to shred your paperwork instead of simply tossing it into the trash could help protect you from identity theft.

3

Name your price

Now that you have decided what to keep and what to toss, it's time to price the things you have decided to sell. Pricing your items is often the most difficult part of the decluttering process. Some items that mean the world to you might not carry a huge monetary value. Remember, the goal is to downsize, and [shoppers looking for a bargain](#) will often be ready to haggle. Your favorite brass candlesticks can't carry a whopping price tag with no wiggle room, or else they're going with you to the new place.

On the flip side, you may have [items you don't realize are quite valuable](#). Maybe the piece of art your grandmother gave you is actually an original worth several hundred dollars. This is where it pays to retain some help. There are companies that specialize in handling estate sales, and they work with appraisers. If you think you might have higher-ticket items, consider having a professional appraiser come in to give you guidance on an item's actual value. Another way to seek some guidance on pricing is to scour other estate sales and online listings to get a sense of what certain things are selling for.



4 Get ready to sell, sell, sell



When you feel like you have enough valuable items that someone might be in the market for, it's time to consider where to sell. Popular settings for secondhand sales include estate sales, consignment stores, buy/sell/trade Facebook groups, garage sales, online listings and eBay.

If you've got your eyes on an estate sale, it's important to know what estate sale shoppers are looking for. Common items at estate sales include jewelry, art, antiques, furniture, silver, china and even appliances. But that doesn't mean you can't also include additional items such as cars or computers.

Estate sale shoppers tend to know what they are looking for, [so it's important to leave things where you'd normally find them](#) in the home. For example, if someone is looking for chinaware, they won't think to look for it in the back bedroom. They will go

straight to your dining room to see if your sale includes china. Because shoppers will be meandering through your home, remove or clearly mark any items that aren't for sale, and be sure to securely store or hide any valuable items that are not for sale.

Although estate sales have a particular audience, when you sell online, anything goes. Buyers may happily take everything from furniture to clothing off of your hands. If you're considering selling online, here are a few platforms that could help you do it.

**Read our blog for more tips
on how to have a
great estate sale**



FACEBOOK MARKETPLACE

You may already be using Facebook to keep in touch with friends and family. Why not use it to sell a few items as well? [Facebook Marketplace](#) is a feature that allows users to sell everything from cars to tools and even houseplants. You'll simply need to click *Sell* on the marketplace page, select the category your item falls under, and then add photos and a description. Facebook users can message you if they are interested in your products, which allows you to see who you'll be doing business with ahead of time. You can also engage in trades — for example, giving someone a card table and taking their blender in return.

OFFERUP

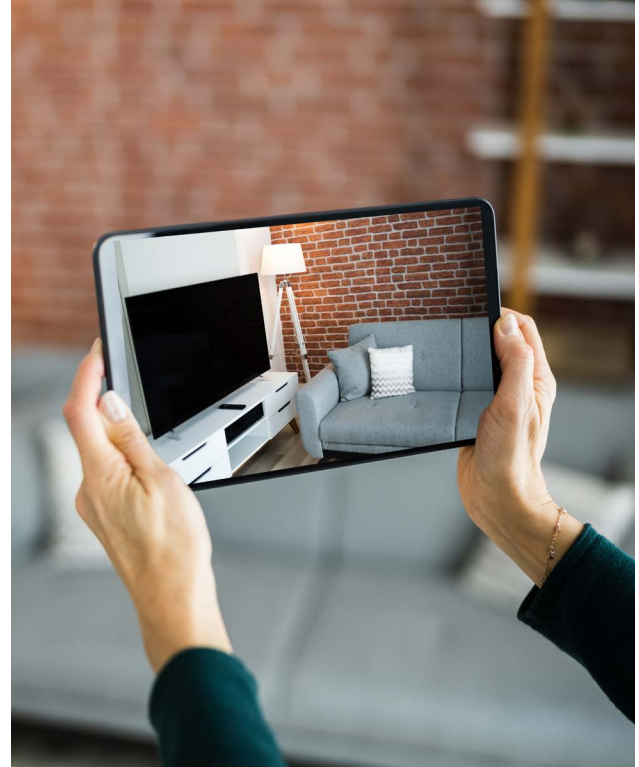
[OfferUp](#) is free to use and works on your browser or smartphone. After you download the app, click on “post” and then “take a picture.” Snap a quick smartphone photo of your item, and the next page will ask you for a brief description of it. Click “next,” input the price, and then click “post.”

AMAZON

After creating an [Amazon seller account](#), you'll be able to choose your product category and add products accordingly. Try to provide unique and catchy product details and descriptions to help attract more customers. [Amazon does take a small fee](#), as well as a referral fee. But a benefit of using this platform is you can list your item and let the platform do the work for you. Then, Amazon will provide you with instructions on how to ship your item to the customer.

EBAY

To sell on [eBay](#), you'll list your item by posting photos and creating a product description. EBay can make a price recommendation, or you can pick your own price. Once you make a sale, you'll



need to find a box to place your item in, print your shipping label directly from your eBay account, and drop the item at the post office or hand it to a mail carrier. EBay offers a selling tutorial on its [Seller Center information page](#).

NEXTDOOR

You may already be using the [NextDoor website](#) or app to keep tabs on what's happening in your neighborhood. If you're unfamiliar with the service, it's basically a virtual message board that lets you connect with neighbors, get recommendations on things like finding a tailor, or hear about upcoming activities in your area. It also has a “for sale” feature where you can create a post, add photos of your item and set a price tag. Neighbors can comment on your post or send you a direct message if they're interested, and then you can arrange a pickup.

**Read our blog
for online sales
safety tips**



5 Donate the rest

Things you don't sell can often be donated. Courtney Carver, a downsizing expert and the author of [Simple Ways to Be More With Less](#), recommends setting some guidelines to decide what to sell vs. donate. "For example," she suggests, "only sell if someone would pay at least \$50, otherwise donate."

If something doesn't sell, there are many ways to donate items. [Join your local Buy Nothing group](#) to connect with locals in your area who might want items you'd like to give away. Most people in these groups share their addresses and place items on their

porch for a safe and contact-free pickup. You can also arrange for organizations like the Salvation Army or Goodwill to come by your home and collect donations.

Be sure to ask for receipts. Anytime you donate to a charitable organization, you should ask for a receipt for tax purposes. Charitable donations may allow for tax deductions which can add up when you are in a season of simplifying your life. Always consult a tax professional to see what qualifies. Before making a donation, contact the organization to confirm which items they do and do not accept. Many also offer free pickup, so you can keep sorting!



6 Enjoy the peace of your decluttered space

As you start to see the fruits of your downsizing efforts, be at peace about your decisions. Give yourself a big pat on the back for completing a massive task on your own terms.

CONCLUSION

**“You did a beautiful job
... it looks like home!”**

With boxes lining the hallway filled to the brim with memorabilia, Gwen and her assistant, Allison, carefully comb Marilyn's apartment. “Functionally, it seems good there,” remarks Gwen after carefully positioning and repositioning Marilyn's decor. “Aesthetically,” Gwen paused, shaking her head, “I don't know.”

The clock is ticking on the renovation, and Gwen's time helping out is almost up. Marveling at all the work still remaining to be done in the ninth hour, Gwen laughs anxiously, “Now I'm a little nervous! How much time do we have left?”

But, as luck would have it, Gwen is able to finish the work of decluttering, designing and displaying Marilyn's belongings, both old and new, in no time.

When Marilyn, with her dog, Posh, in tow, sees her newly arranged living quarters, her jaw drops. “Oh my gosh, what a cool idea!” she says to Gwen, astounded by all the newly

opened space. “You did a beautiful job. I can't get over it!” Marilyn says, as Posh cuddles up on the new carpet. “It looks like home.”

It's important to have a home that is aligned with your current needs as well as the precious, memorable parts of your past. This is why a little decluttering, designing and downsizing can go a long way.

If you want a home like Marilyn's, one that feels like home and not a cluttered mess, then you're in luck. You now have all the tools that Gwen deployed in her downsizing of Marilyn's new home. Of her new surroundings, Marilyn says, “I can't wait to get up in the morning and say, ‘Wow, look at this!’” You deserve a home that feels just like that: *home*.

**With this downsizing guide,
your dream of decluttering
can become reality. Best of
luck, and Happy Downsizing!**

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