

# Essential Organizing & Downsizing Strategies for Seniors



**Presented by:**

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## Professional Organizer

1. What is a professional organizer?
  - a. They use tested principals and expertise to enhance the lives of their clients.
  - b. Design custom organizing systems and teach organizing skills.
  - c. Help individuals and businesses take back control.

## Downsizing Terminology

1. Aging in Place-the ability to live in one's own home safely, independently, and comfortably regardless of age, income or ability level. Instead of selling, older Americans are modifying their homes to make them more user-friendly.
2. Right-Sizing- It is the concept of working with what you have by making better use of existing space.
3. Downsizing-making due with less.

## Step 1: Downsizing? Get in the Downsizing Mindset

*Note: Take action now to lighten your load before someone else decides to lighten it for you. Simply your life.*

### A. What would be reasons to downsize?

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_



### B. Apply the Pareto Principal

- a. This principal states that we use 20% of our belongings 80% of the time. Define what your essential 20% are—the things you use on a daily or weekly basis—and it will be easier to part with part of the 80%. This will help you see you really use a fraction of your belongings.

### C. Your Real Priorities

- a. How do you want to spend your future? Do you want to travel, take up a new hobby, volunteer, play with your grandchildren? Create space in your life for these things.

### D. Keep the Memory

- a. But let the item go. Peter Walsh says, “A memento is not a memory.” Repeat it! One idea is to take a picture of an item to remember it.



## Step 2: Staying Put?—Clear the Decks and Get Organized!

### A. Safety is #1!!!

- a. Trip/Fall/Slip Hazards (Ex: loose rugs, lighting, clutter, cords, etc...)
- b. Fire Hazards (blocked exits, accumulations of papers, etc...)
- c. Bathroom/Bedroom Hazards/Steps (broken steps, loose hand-rails)

### B. Physical Limitations ...in other words, Ask for Help!

### C. Accessibility and Making modifications

- a. Keep things within arms-reach, eye level or waist-high
- b. Consider the weight of items. (pots, pans, glasses, etc...)
- c. Use slide out shelving options/Lower items in your closet
- d. Relocate/Replace items (Ex: Relocate old washer/dryer to an upstairs room)

### 2. Keep Important Paperwork Organized and in One place

- a. Birth Certificates/Wills/Living Trusts/MPOA/Insurance Papers/Phone Numbers
- b. Deeds/Loans/Investment Papers



### 3. Old News is Bad news

- a. Purge old newspapers, magazines, **SHRED** credit card offers.

### 4. Think like a minimalist

- a. Donate items you no longer use or are interested in to those who need it, want it, and will use it.
- b. Keep only what you need, love, or cannot replace.

### 5. \*Purge old computers/hard drives correctly \*Make sure to get a Document of Destruction for erasing hard drives/shredding services.

### **Step 3: Downsizing: Start Planning**



#### **A. Gather Your Team**

- a. Think of people who will be helpful in a variety of ways.
  - i. Someone to physically help you move things—carrying/transporting.
  - ii. Someone to help you talk through some difficult decisions.
  - iii. Someone who can help keep the project going on time.
  - iv. Realtor/Auctioneer/Consignment Shop/Moving Company

#### **B. Gather Your Tools**

- a. Garbage bags/Empty boxes/Markers/paper/sticky notes
- b. Laundry baskets (to move items from room to room)

#### **B. What Should I Take With Me?**

- a. Ask yourself, “How do I live my daily life?” What does your lifestyle “look like?”

#### **C. Use your new floor plan as a guide**

- a. Do not guess what will fit into your new living space. Measure and make sure!

#### **D. Pick where you will start**

- a. Start in the rooms you use the least.

#### **E. “Come and Get it!”**

- a. Tell friends and family that you are returning those items that you have been storing for them for so long.

## Step 4: Ready, Set, Go!

A. Sort Items into categories;

- a. Keep-items that will go to new home
- b. Pass-items that will be given away, sold, or donated
- c. Trash-things that need to be discarded



B. Ask yourself: Do I love it? Do I need it? Do I have room for it?

C. Little by little.

- a. Work a little each day.

D. Enjoy your new home, new space, and new found time!

E. Other Considerations:

- a. Rethink “The Garage Sale” and Want Ads. Garage sales are time consuming and leave many items behind and want ads invite strangers to your home.
- b. Consider the cost savings of downsizing to a smaller home.



**Professional Resources:**

1. All Squared Away, LLC (Professional Organizers)
2. National Association of Home Builders Remodelers Council
  - a. CAPS-Certified Aging-in-Place Specialist
3. Real Estate Professionals
4. Occupational/Physical Therapists
5. Relocation Specialists
  - a. NASMM-National Association of Senior Move Managers
6. Professional Organizers
7. Geriatric Care Managers (Nurses, social workers, etc...)
8. Managed Care Coordinators—ensure their clients have whatever services are needed for a broad range of issues related to the well-being of their client. (Liaison, advocate, assisting...)
9. Financial Planner/Estate Planning Attorney/Personal Property Appraiser

**Book Resources:**

- *But I Might Need it Someday*, Patty Kreamer, CPO
- *Don't Toss my Memories in the Trash*, Vickie Dellaquila, CPO, CPO-CD
- *The Boomer Burden*, Julie Hall
- *Gaining Control Over Home Downsizing: Inspirational Stories*, Karen J. Martin
- *Moving a Relative with memory Loss: A Family Caregiver's Guide*, Laurie White and Beth Spencer
- *Right-Sizing Your Home*, Gayle Steves
- *Rightsizing Your Life: Simplifying Your Surroundings While Keeping What Matters*, Ciji Ware
- *Moving for Seniors, A Step-by-Step Workbook*, Barbara Morris

**Internet Resources:**

- NIH Senior Health- [www.nihseniorhealth.org](http://www.nihseniorhealth.org)
- AARP- [www.aarp.org](http://www.aarp.org)
- US Administration on Aging- [www.aoa.gov](http://www.aoa.gov)

**Julie Mills, CPO®**, Owner, [All Squared Away, LLC](#)

“Organizer Lady, Clutter Fairy, and The Game-Changer,” are all names that have been given to Julie Mills by her clients.

Since 2006, Certified Professional Organizer, Julie Mills has been helping businesses and individuals discover the obstacles in their lives that prevent them from achieving their organizational goals. She starts with a practical approach and uses proven methods for helping her clients achieve order and success in their lives.



Ms. Mills and All Squared Away have been featured in [The WV State Journal](#), [The Dominion Post](#), [The Times WV](#), [The Clarksburg Exponent](#), numerous state-wide publications, and is also a contributing guest writer for both [WV Family Magazine](#) as well as [The MorgantownMagazine.com](#).

With over 4,000 hours working, training and consulting with clients, Julie and her talents are well-known throughout West Virginia.

She has earned the following certifications from the Institute for Challenging Disorganization:

- Level I Certificate in Chronic Disorganization
- Level I Certificate in CD Client Administration
- Level I Certificate in Basic ADD Issues of the CD Client
- Level I Certificate in Time Management

Julie’s motto is that, *“Being organized is not about being perfect, it is about finding a system that works for you.”*