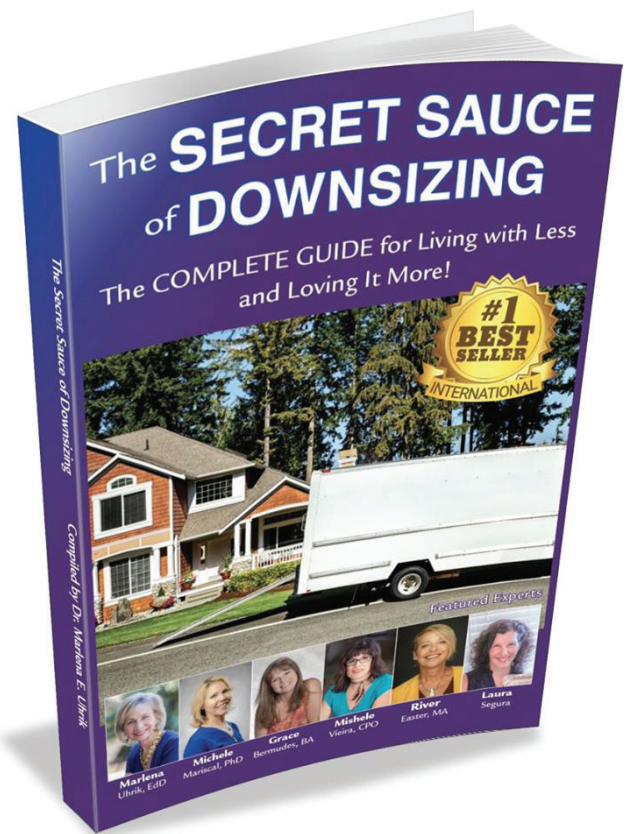


The Secret Sauce of Downsizing eBook

Online Course Chapter 2



Dr. Marlena E. Uhrik



www.AllWaysLearning.org



www.Amazing-Staging.com

The Secret Sauce of Downsizing eBook

Online Course Chapter 2

THE TALK

Dr. Marlena E. Uhrik

The Secret Sauce of Downsizing - eBook Videos

“ WELCOME
Video Only ”

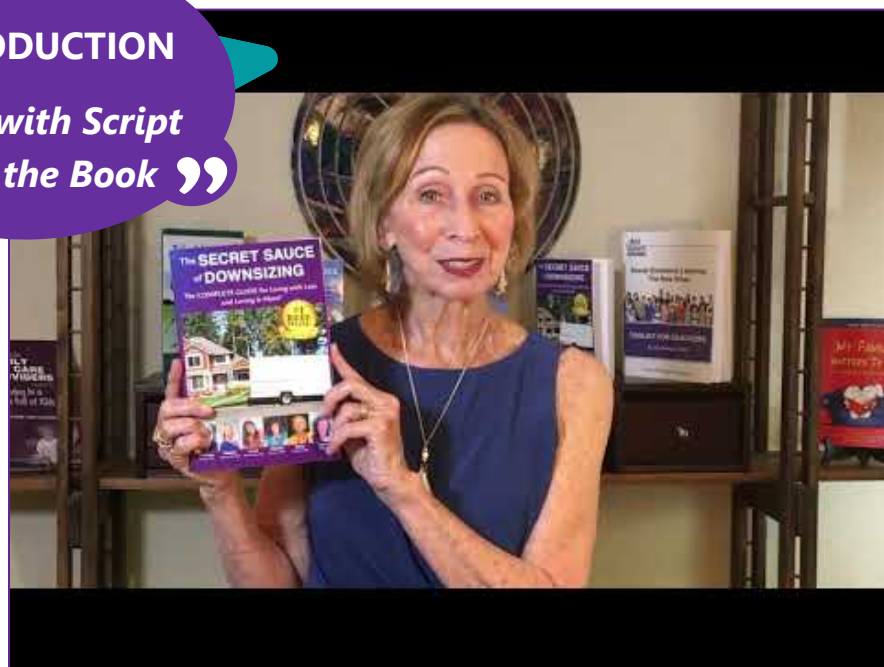


Greetings from Dr. Uhrik.

Discover what three things inspired her to write *The Secret Sauce of Downsizing*.

<https://youtu.be/wOkvbMzCj2g>

“ INTRODUCTION
Video with Script
from the Book ”



Here's what her Dad's experience of downsizing taught her.

<https://youtu.be/fMg7YxiHj0Y>

**“ THE NEW
RETIREMENT ”**

*Video with Script
from the Book ”*



Baby Boomers are here to stay and they are not your typical grandparents!

<https://youtu.be/ltcMp78Bpck>

“ THE TALK ”

*Video with Script
from the Book ”*



How to get through “The Talk”---one of the toughest conversations to have.

<https://youtu.be/wMqkw dv7w3U>

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The Secret Sauce of Downsizing

Introduction

Marlena E. Uhrik, Ed.D

All Ways Learning, LLC

Amazing-Staging.com

AllWaysLearning.org



Marlena has always been passionate about empowering people. During her 50-year career in education, she earned her Doctorate Degree and received numerous local, state, and national awards for the work she has done for children and families.

She was the recipient of the United States Service Award, a 1996 Olympic Torch runner, acknowledged in the United States Congressional Record and recognized on the California State Assembly floor for her work as Founder and past Executive Director of "The Kids' Breakfast Club."

Now, as an award-winning author and speaker, Certified Home Stager and Realtor, Marlena continues to inspire, educate, and empower others.

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The Secret Sauce of Downsizing

"The Talk" Written Exercises



Getting Ready for "The Talk"

1. Who will be part of "The Talk?" List the names here:

Others: _____

2. When will this meeting take place? Day? Time? Where?

Date: _____

Time: _____

Location: _____



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Assessing the Needs



1. What are the needs of the person? What are the things you need to consider?

Examples:

- Medical Issues/Needs? (Doctor visits, tests, etc.) How often? Too what extent?

- Social/Emotional Issues/Needs:

- Cognitive (Memory) Issues/Needs:

- Physical Issues/Needs:

- Spiritual Issues/Needs:

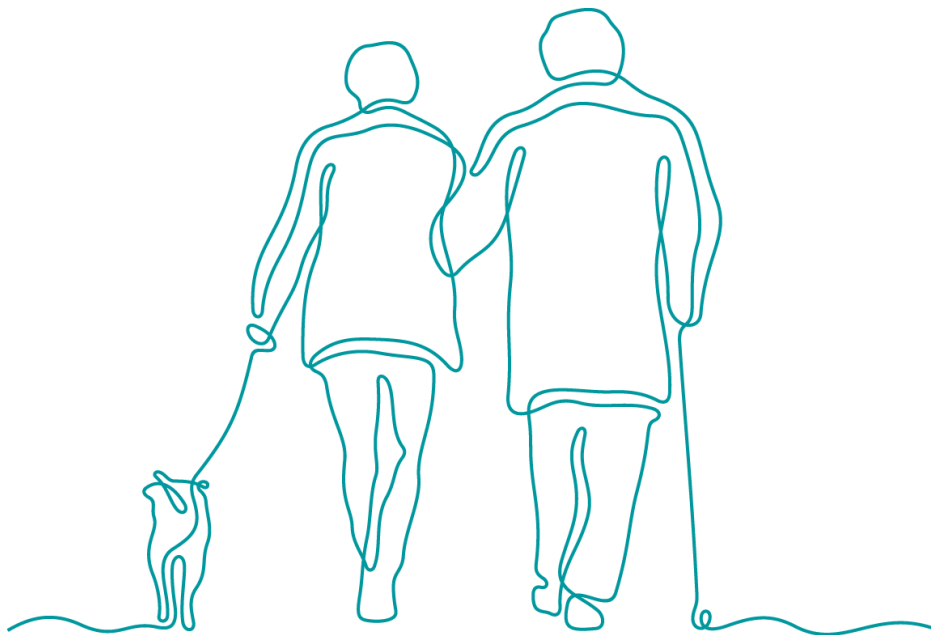
Things that are Important



What are the top 3-5 things that are important to the person who is moving?
Write the answers here.

Examples: Feeling Safe, Close to Family, Independence, Food, etc.

1. _____
2. _____
3. _____
4. _____
5. _____



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Options-Pros and Cons



What are your options in terms of choosing the next move?

Example: Age-in-Place, Active Senior Community, Assisted Living, Senior Apartment, Tiny Home, Friend/Relative, Other?

Write options here.

1. _____
2. _____
3. _____

Options	Pros	Cons	What Needs to Be Done?	What are the Financial Implications?
Age-in-Place				
Active Senior Community				
Assisted Living				
Senior Apartment				
Tiny Home				
Friend/Relative				
Other				



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It Takes a Village



1. Who are the professionals that are needed in helping make this decision? What are the things that need to be considered that have financial implications?

Example: Financial Planner, Tax Person, Insurance Agent, Real Estate Agent/ Reverse Mortgages/ Tax-Deferred 1031 Exchanges, Capital Gains Tax, Estate Tax, Social Security, Pension Income, etc.

It Takes a Village

List of Professionals We are Working with During This Move

Name of Contact	Profession	Name of Company	Phone	Email Address	Date Contacted	Outcome	Follow-up Needed	Other



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Making the Right Move



A Checklist of Things I Need to Know

What are the things I need to know about my new location?

Services at My New Location	Who Will Help Me Find Out This Information? When?	Where is it Located?	What are the Hours of Operation?	Other Things I Need to Know
Concierge				
Dining Room				
First Aid Station				
Garden				
Laundry				
Library				
Lobby				
Music Room				
Post Office				
Other				



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The Secret Sauce of Downsizing

Adjusting to the “New” Reality

Congratulations! You have moved through an important life event. You have discovered that this process of downsizing/rightsizing is a huge undertaking with many moving parts. You have discovered in *The Secret Sauce of Downsizing* that downsizing can be challenging and sometimes complicated. Downsizing is definitely more than just throwing stuff away---it’s about letting go of a lifestyle and creating a whole new chapter in your life.

There will be still be some logistical things that need attention. Work out details for support and ways to stay connected to the people and things that are important to you. What will help make this a smooth transition? Who will be part of the new support system? What kind of support will be needed? Phone calls? Visits? How do we capture memories? How do we make each day count? How do we stay connected to one another?

While the logistics for making practical decisions is important and necessary, so are the things that nourish the body, mind and spirit. Staying in communication with others is critical. Be sure to keep cherished moments close to your heart. Hopefully, there are pictures, photo albums, and/or videos as reminders of the things that are still important to you that you can share with others. Keep your stories alive by sharing those with others, too.

Keep being grateful for each new day.



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