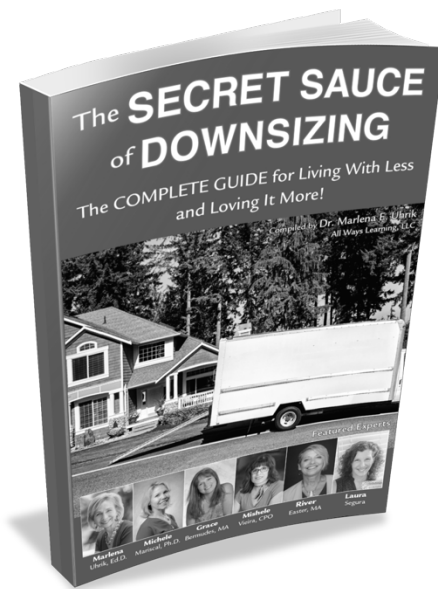


The Secret Sauce of Downsizing

The Complete Guide for Living with Less and Loving It More!



Compiled by Dr. Marlena E. Uhrick
CEO and Founder of All Ways Learning, LLC



The Secret Sauce of Downsizing

Meet the Amazing Authors That Share Their Expertise, Experiences, Stories, and Strategies for Your Success



Compiled by Dr. Marlena E. Uhrik
CEO and Founder of All Ways Learning, LLC

Dr. Marlena E. Uhrik, Speaker, Trainer, Best-Selling
Author, Award-Winning Educator, and Nationally
Recognized Children's Advocate

Copyright © 2020 by Marlena E. Uhrik. All rights reserved. No part of this book, or its associated ancillary materials, may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any informational storage or retrieval system, without permission from the publisher, with the following exception: All authors within this book have the rights to repurpose their own chapters any way they choose to do so.

Published by Marlena E. Uhrik, CEO, All Ways Learning, LLC.
5960 South Land Park Drive, Suite 396, Sacramento, CA 95822,
(916) 800-3295, www.AllWaysLearning.org

DISCLAIMER AND/OR LEGAL NOTICES

While all attempts have been made to verify information provided in this book, and its ancillary materials, neither the authors nor the publisher assumes any responsibility for errors, inaccuracies, or omissions, and are not responsible for any financial loss by customer in any manner. Any slights of people or organizations are unintentional. If advice concerning legal, financial, accounting or related matters is needed, the services of a qualified professional should be sought. This book and its associated ancillary materials, including verbal and written training, are not intended for use as a source of legal, financial, medical, psychological, or accounting advice.

With respect to the reliability, accuracy, timeliness, usefulness, adequacy, completeness, and/or suitability of the information provided in this book, Marlena E. Uhrik, All Ways Learning, LLC, its partners, associates, affiliates, consultants, and/or presenters make no warranties, guarantees, representations, or claims of any kind. Readers' results will vary. This book and all products and services are for educational and informational purposes only. Check with your accountant, attorney, or professional advisor before acting on this or any information. Marlena E. Uhrik and/or

All Ways Learning, LLC is not responsible for the success or failure of your business, personal, health or financial decisions relating to any information presented by Marlena E. Uhrik, All Ways Learning, LLC, or company products/services.

Any examples, stories, reference, or case studies are for illustrative purposes only and should not be interpreted as testimonies and/or examples of what reader and/or consumers can generally expect from the information. Any statements, strategies, concepts, techniques, exercises and ideas in the information, materials and/or seminar training offered are simply opinion or experience, and thus should not be misinterpreted as promises, typical results, or guarantees (expressed or implied).

ISBN: 978-0-9797368-9-6

Edited by Carol Quint

Cover design by Alicia White, Back of the Room Productions

Interior design by Kari DeCelle

Katrina Sawa, Production Manager and CEO of
JumpstartYourMarketing.com

Published by

All Ways Learning, LLC

Sacramento, California

www.AllWaysLearning.org

PRINTED IN THE UNITED STATES OF AMERICA

Dedication

The Secret Sauce of Downsizing is dedicated to individuals 55+ or any age, who are shifting gears into a new era of their lives. Whatever the reason or season for downsizing, *The Secret Sauce of Downsizing* is meant to support those on this life-changing journey.

Designed to provide tips, secrets and strategies for making downsizing a smooth transition, this book is meant to encourage and empower individuals to live their best life, no matter what.

Special thanks to my husband, Bill Wheelock, who has always assisted me and supported me in the work I do. Thank you also for the amazing authors who contributed to this book. Their expertise is distinct and unparalleled.

Table of Contents

Introduction	1
<i>Marlena E. Ubrik</i>	
Chapter 1: The New Retirement.....	5
<i>Marlena E. Ubrik</i>	
Chapter 2: “The Talk”	11
<i>Marlena E. Ubrik</i>	
Chapter 3: Processing Your Emotions	17
<i>Michele Mariscal</i>	
Chapter 4: The Art of Decluttering.....	35
<i>Marlena E. Ubrik</i>	
Chapter 5: Simplify Your Move	41
<i>Grace Bermudes</i>	
Chapter 6: “But I Love My Stuff”	61
<i>Misbele Vieira</i>	
Chapter 7: Gratitude	81
<i>Marlena E. Ubrik</i>	
Chapter 8: 5 Steps to Downsizing with Mindfulness	87
<i>River Easter</i>	
Chapter 9: Comparison Case Study: Planning vs. No Planning	109
<i>Laura Segura</i>	

What’s Next.....119
Marlena E. Ubrik

Resources123
Marlena E. Ubrik and Helen Justice

Introduction

By Marlena E. Uhrik, EdD

Remember when being retired conjured up pictures of Ma and Pa sitting on the porch in their rocking chairs? There were even phrases associated with retirement such as “over the hill”, and “being put out to pasture.” It sounded like retirement basically meant the end. Those days of “over the hill” thinking, for the most part, are disappearing. A whole new look at aging is emerging, and it is encouraging.

The “New Retirement” conjures up images of being the best version of yourself, with greater possibility of living longer, healthier lives, and perhaps fulfilling once forsaken dreams. There are more opportunities for opening the door to creating a life of new opportunities. In other words, if you are 55 and over---it’s not over.

While the information in this book is targeted for 55+, the concepts and processes involved in downsizing, or rightsizing, can be applied to almost any age group. Whatever the reason or season, we are stepping into a new reality. We are closing a chapter of our lives as we have known it, and getting ready to write a new chapter.

The inspiration to write *The Secret Sauce of Downsizing* was based on both personal and professional experiences. As a Realtor and Home Stager, many of my clients were having to move their parent(s) out of their existing home to a new location. Sometimes this meant moving from a two-story home to a smaller, single story dwelling. Most of the time, however, this meant moving a parent who had lived in their home for decades, to a new location that was often in another part of town, and a fraction of the size. Personally, I reflected on how hard this process was in my own family when I was helping my Dad “downsize” from his 2,400 square foot home that had a beautiful backyard with a rose garden, to a

The Secret Sauce of Downsizing

senior living center with a two-bedroom 800 square foot studio that had a concrete balcony.

In the process of helping my Dad, friends, family members, and my clients, what I discovered is that downsizing is no joke! It can be quite a shock when you realize you have a significant amount of stuff that's not going with you in your next move. There are also an overwhelming number of factors involved in the planning and decision-making. Finances, health, proximity to family, friends, place of worship, and location, all play a huge role in making these decisions.

The mere logistics of moving is enough to boggle the mind and requires an enormous amount of stamina and fortitude. On top of weighing all the factors, and going through the final decision-making process, there is also the huge emotional process of "letting go" of a life that has been familiar.

The Secret Sauce of Downsizing is a compilation of authors who have expertise in the various phases of

downsizing. We will be providing you with a variety of voices, sharing our personal and professional experiences. This book is intended to assist those involved in the process of downsizing and guide them through to the next stage of their lives. It is not always an easy journey as there can be many bumps along the way---most likely accompanied by tears, and hopefully, laughter. Here's to navigating through uncharted waters, with the wisdom and courage that comes with age and experience, and the unfolding of a new chapter of life.

Chapter 1

The New Retirement

By Marlena E. Uhrik, EdD

Our national statistics say that Baby Boomers are turning 65 at a rate of 10,000 a day (National Association of Realtors. Senior Real Estate Specialist/SRES Flyer) This fact alone will definitely have a huge impact on our society on everything from our health care needs, to housing needs, and everything else in between. The Boomers are here to stay, and they are not your typical Ma and Pa grandparents. They are the grandparents who fly hang gliders, ride motorcycles, and surf. Many Boomers of today are interested in experiences such as traveling around the world, RVing throughout the United States, taking up new sports, new hobbies,

starting businesses around their passions, meeting new friends, and creating a life they love.

With modern medicine and forever changing technology, people are living longer than ever before. The U.S. Centers for Disease Control and Prevention released its annual report showing trends in health and healthcare over the past 40 years. The CDC report, titled *Health, United States, 2016*, shows Americans are living longer and fewer are dying from major diseases now, compared to 40 years ago.

“The greatest success of humankind, I would argue, is not space travel. It is not the internet. It is that we have made it possible for people to live longer. Now our challenge is how to make them live better,” said Joseph Coughlin, AgeLab director, and author of the book, *The Longevity Economy*. “The aging of the United States should not be looked at as a sudden problem—it should be looked at as an opportunity.”

In 1900, the average life expectancy was 50 years old. According to the Centers for Disease Control and Prevention, the average life expectancy in the U.S. is currently 78.6 years old, with women living 4.9 years longer than men. Coughlin estimated that half of adults who live to age 65, live well beyond 85 years.

“The fact of an aging population is this is a full one-third of your adult life that still lays ahead of you at age 65,” Coughlin said. “It is no longer a short period of golf courses, beach walks and trips to Disney with the grandchildren. It is now going to be a time for perhaps going back to school, starting new businesses, staying in the workplace longer, joining the gig economy.” Source: Census: American Population Is Living Longer June 19, 2019
AMANDA PAMPURO.

Obviously, with this possibility of a new lease on life, those of us who are over 65 years old have the opportunity to invent a lifetime of new experiences. How we move forward and what we create will

depend on a lot of things, with health and finances being some of the biggest factors. Our mindset will be challenged to include redefining old age, and aging, and to look at some of our beliefs that might be limiting our thinking about what and how to create this time of our lives.

Mindset is really going to be key in this process of creating a new and different life than we have known. Stepping into a new era of our lives can be scary and exciting at the same time. With a positive mindset, support, and encouragement, the new life that we are creating can be less overwhelming and more rewarding, no matter what the physical challenges may be.

I am often reminded of the phrase my Dad often said, “Doing the best I can with what I got.” He used this mindset and positive attitude even when he was in hospice care. I will forever remember the day he wanted to walk again---not having walked for almost three months. He was so determined that he

could pull himself out of his hospital bed. With the help of his attendant, he did! He put on his leather shoes that he had kept next to his bed, which he had meticulously polished and shined. With a great deal of struggle, I watched in awe as he shuffled a few steps here and there down the hallway with the help of his walker and attendant. He, of course, was exhausted and had to sit down almost immediately. However, the smile on his face will be with me forever.

The hope is that *The Secret Sauce of Downsizing*, will help provide the skills, tools, and information that you need to know, to plan and prepare for a smooth move forward. We also hope to inspire our readers to discover or rediscover the inner strength, conviction, and confidence needed to take those next steps and create a life you love. Remember, it's not over until it's over.

About the Author

Marlena E. Uhrik, EdD

Marlena has always been passionate about empowering people through education. 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 and empower others.

Chapter 2

“The Talk”

By Marlena E. Uhrik, EdD

“The Talk” about downsizing is going to be one of the most important things that can happen, in order to figure out next steps. It might be a tough conversation to have. However, best-case scenario, it is best to have “The Talk” sooner, rather than later. Ideally, this decision-making conversation is best when it is established ahead of time who will be the decision maker(s), (hopefully, the person who is downsizing) and what things need to be decided. Typically, the adult children of a parent, a close friend, or relatives take the lead in getting this process organized. Fortunately, there are also professionals, such as Elder Care Specialists, Benefit Care Consultants, and Senior Care Navigators, who work to help families through this process.

As this can be an emotionally-charged experience, it can be helpful to meet at a time and place that is conducive to conversation in familiar surroundings, such as the kitchen table or living room. It is helpful to do as much research ahead of time as you can, then discuss ideas and listen for solutions. Also listen for the feelings about what the move means to all of those involved---especially the one who is moving!

The options can seem endless. How do you decide? Will it mean aging in place, moving to an active senior community, a studio apartment in a senior living center, a tiny house, an intergenerational housing unit, a mobile home, or moving in with a friend or family member? Will assisted living be necessary? Memory care?

Because finances usually play a huge role in deciding about next steps, go over the financial implications of each option and develop a plan. Consider the things that are important to the person who is downsizing. This would include such things as medical needs,

transportation, social activities, community engagement opportunities, indoor/outdoor activities, fitness programs, and special hobbies.

Schedule time to research options ahead of time.

Look on-line, go on tours to see what's available and feel which place is most appropriate. It is also helpful to write things down about the decisions that have been made. Many people like to create a chart, calendar or timeline so that everyone can understand the big picture to help accommodate the overwhelming number of factors involved in the planning and decision-making.

Realize that this process is going to “take a village” and that you might need the counsel of trusted friends and professionals. Many issues may be out of your area of expertise and require specialized knowledge. You may be required to help make decisions about things like using a reverse mortgage, Home Equity Conversion Mortgages, etc. Then there is the issue of taxes and understanding Capital Gains

Tax on the sale of the primary residence, estate tax issues, Tax-Deferred 1031 Exchanges, and taxes on Social Security and pension Income. (Senior Real Estate Specialist Designation Course)

It is also critical to make sure that legal issues are taken care of and that there is an updated trust or will. Seek out professionals and interview them. Ask friends and associates for trusted advisors/experts. Connect with your local Chamber of Commerce and/or Better Business Bureau to find the professionals you believe will best serve your needs.

Remember we are making decisions for what is best for the person who is moving. Make sure that the facilities that you are looking at will meet the needs of the person downsizing and not just be about filling in a vacant spot in a facility.

I remember when my Dad was looking at a senior living facility. As the oldest in the family living several hundred miles away, I had noticed each time we visited that his health had been declining. He had

emphysema and he needed to use his oxygen more and more of the time. Any physical activity ran him down. He decided that he would look for a place on his own and found a very beautifully-appointed facility close to his home.

The lobby looked like it could have been a hotel lobby in San Francisco with dark rich wood, thick carpet, beautiful fresh flower arrangements, and gorgeous artwork on the walls---truly a spectacular place to be. My Dad decided to put a deposit down on one of the rooms. He asked me and my husband to go with him so he could show us where he was going to move. When we got there, we discovered that the establishment had assigned my Dad a room on the third floor of the facility.

While there was an elevator available, it was located quite some distance from what would have been his studio apartment. I felt this was totally inappropriate because of the fact that he was on oxygen full-time and it was difficult for him to walk any distances even

with his oxygen mask on. I requested that he be moved to a ground floor studio which the management promptly did. I felt if I had not been there to advocate for my Dad that he would have been placed in a location that was more convenient for management and not for my Dad.

On top of weighing all the factors and going through the final decision-making process, there is also the huge emotional process of letting go of a life that has been familiar. It often involves selling the home/property, and maybe even doing some updating or remodeling in order to get the property ready for the real estate market. Remember this is a very emotional time for everyone---it can be full of stress---everyone is in uncharted waters---whatever the reason or season for downsizing --- when you see that For Sale sign on the front lawn it signals a loss of what has been familiar---often a lifetime of memories.

Feel free to contact me for more information at www.AllWaysLearning.org.

Chapter 3

Processing Your Emotions

By Michele Mariscal, PhD

Regardless of how you are feeling about the prospect of moving, change can bring unexpected stresses. The excitement and forward movement of planning a move may bring happy feelings. Or, if the move has been prompted by a need to lessen a financial burden, you may have some depleting emotions that are causing stress. It's important to manage your energy and continue to keep good self-care habits throughout this process of downsizing.

Stress and Nervous System Impact

Emotions that you are aware of, as well as those that might be under the radar, or ones that you are not aware of are, being registered in your heart and

sending signals to your brain. The science from the Institute of HeartMath® helps us understand the effects of this signaling. Their research shows how emotions are the drivers of physiology with effects in the nervous, hormonal, and immune systems. Highly activating emotions, whether good or bad, accelerate activity in the sympathetic arm of your autonomic nervous system. This starts a cascade of hormonal changes, the most notable being increases in cortisol and adrenaline. Emotions that are more unconscious, but still nattering away in you, are also creating changes in the hormonal system because of the effect on the nervous system, which is a bit out of sync with continuous chaotic signals coming from the heart to the brain. The word that HeartMath® uses to describe when the systems are all in sync is coherence. When you are able to interrupt chaotic emotional signals from highly active or depleting emotions throughout the day you are able to manage your stress, and when you go to sleep at night you actually sleep!

So, to understand how your sleep is affected it's important to understand how your body is processing your emotions. When you have a very highly active emotion (whether excited or angry) it can take up to 12 hours for your body to come back to a normal state. The nervous system activates a flow of hormones, which can be up to 1400 biochemical reactions! This has implications on blood sugar levels, heart rate, blood pressure, inflammation and lots of other physical manifestations. It also makes it harder to make clear decisions when you stay in highly activated states of emotions. When you are in continuous states of lower activation types of emotions that are depleting (worry, regret, guilt), the hormonal effects become much more chronic, and this is where you begin to suffer some of the detrimental effects of stress. So, it's critical to stay on top of your stress as you are going through this downsizing!

The good news is you can stay on top of your emotions and what's happening in your body with

awareness and a few tools which I will share with you. So right now, take a moment to ask yourself what you are feeling. You may have not ever stopped long enough to consider what feelings you have, but it is the one step in stress management that can make or break actually “managing” stress. You want to notice if you are staying in highly activated emotions. I used to think I didn’t care as long as I was feeling good but when I would stay in high states of excitement and get stuff done mode, I paid a price because my nervous system was feeding so much adrenaline into my body! On the flip side, if you find that your emotions are weighted more toward the side of worry, concern, impatience or other chronic depleting emotions, you are creating hormonal imbalances in your body that may® show up in depletions of your immune system. Given all of the physical effects that these kinds of emotions can have on your body, you will want to take some steps to shift out of them whenever you become

aware of them – and that is the trick – to become aware.

Decision making is also affected by the emotional states that you are in. If you are staying in states of depleting emotions you are sending signals that make decisions harder to make and finding clarity is more difficult – and this is a time that making good decisions is important! So, let's get to those tools!

Tools

Now that you have the idea that emotions are having lots of effects in your body, I want to share some great tools you can use during this time:

1. Heart focused breathing (HeartMath®)

This is a deceptively simple exercise. It goes like this – bring all of your attention and awareness to your heart. If it helps you, bring your hand to your heart or chest area. Imagine that the air is flowing in and out of this area.

Breathe a little slower and deeper than usual, at a relaxed pace.

If you do this simple exercise several times throughout the day it will help build resilience and shift the physiology in your body in the direction of more helpful states of nervous system and hormonal and immune system activity. By doing this it also facilitates the ability to make clear decisions. You definitely want to be in that clear head-space during your downsizing and move, so go to your heart several times a day!

2. Gratitude

Oprah is one of my heroes and I love what she has to say about gratitude. “What I know for sure is that no matter what is going on in your life if you concentrate on what you have, you will have more. If you focus on what you don’t have you will never ever ever have enough!” Try this one tool if nothing else,

especially if you are the one who relates to being in states of depleting emotions like worry and impatience and others from that list. This one tool, done every day, will change your life!

3. Journal

Many people find that keeping their thoughts in a journal is helpful. This is a great place to track your emotions. It can be a place to unwind and express emotions that might otherwise go unexpressed. And of course, this is where you can record gratitude! You may also uncover patterns of behavior in certain situations or with certain people. This can help you make choices and respond differently to something you typically react to.

4. Take time

What I mean by this one as a tool, is to pause, even for just a moment here and there, to be with the people involved in this move. Have a

cup of tea and have a conversation about the activities of the day. This move is not just a checklist item, there are many parts to what is happening. Be present to what is happening. Yes, lots has to get done but allowing yourself to pause, converse, or journal if you are alone will build relationships and keep communication open, and minimize stress.

5. Use imagery

When I was helping my dad move out of his home it was a very stressful time. My mom had died a couple years earlier and while I had cleaned much of her belongings, there were still lots of spaces and piles and boxes that contained hers as well as dad's things. My dad and I were still in the process of learning how to relate to each other, which had changed since my mom had died. In loss, you will often find that as you are adjusting and processing grief, you go through a re-

identification of who you are in relationships. I found myself triggered over and over during those few days trying to manage my own emotions of grief and trying to be helpful. Each time I was triggered I went into the guest room where I had pulled aside some of mom's magazines. I would flip through the pages and find an image that seemed to have the color, shapes, or maybe even some words. I cut it out and put it on a page in my journal and then asked myself what has changed now that I have named this emotion?

You see – you don't always have to have the word(s). Using colored pencils, crayons, or magazines with pictures allows you to access your feelings instead of bottling them up and doing something detrimental with them (like drinking, eating too much, drugs, shopping)

Unexpected Sadness

One of the reasons I suggested “take time” as a tool is to help you stay on top of feelings you are having that may need some recognition. Moving represents loss in several ways – loss of home, belongings (most have a fair amount of purging to do), change in community, and changes in known routines. One of the definitions of grief is *the conflicting feelings caused by a change or an end in a familiar pattern of behavior*. This often goes unnoticed as a loss that you may need to grieve. I was surprised in my own life how much grief I had over the 7 moves that my family made before I was 15 years old. Forty years later as I began to work through my own grief recovery, I recognized how much these losses need to be grieved.

When I work with people in grief recovery, what most often is uncovered are various losses that were never grieved. It’s ok to feel loss and to express that emotion. It’s ok to not be ok once in a while! Know

who the people are in your life who will just listen, without comment, analyzing, or offering advice. I know this can be rare and you may need to ask for this in your relationships.

Downsizing, planned or unplanned, is still loss and it's important to recognize and stay in awareness of what you are feeling. If you find that you are feeling “moody” or reacting in ways that you don't normally react, you may be pushing away some feelings. In my life, I uncovered a pattern of going into anger for no reason, when I was not wanting to allow what I was really feeling to emerge. So, I have learned to pause, ask myself what is there? What am I really feeling? And usually there are some tears that need to come, or at least a recognition of why I am reacting to a person or situation. In that awareness I have choice to do something different – perhaps have a moment of gratitude for something in the situation or life. Downsizing and moving may bring up unexpected emotions - don't be surprised, and use your tools!

Coherent Communications

One of the most common sources of stress in families is communication. It is important to find ways to have open communication about the move, your intention for the move, consideration for others and how they are feeling about the move. Remember that your home may represent something different for each person in your family. Recognize that there may be a need to talk together about these changes in your life.

Helping my dad with his decision to downsize was difficult but I kept holding compassion and understanding as I entered the conversation. My mother had died 2 years earlier and over time my brothers and I had become increasingly concerned about his health and loneliness. He was a very social and gregarious person and because of some health challenges his ability to do several social activities was affected. Two out of the three of us children

lived out of state, making the situation more difficult.

When we were finally able to have an open-hearted conversation, my dad shared that he felt that he needed to stay in the house, that it was the legacy that he had to leave for us, his children. The best living situation for him and his need for help with meals and having people close to talk to was an independent living location that would require most of his monthly income and possibly using savings. His worry about our inheritance outweighed his decision-making process to do what was best for him.

When I was able to express my worry and concern and my inability to help because I lived out of state, my dad began to see that I was much more concerned for him to have what he needed. We had visited several options for places to downsize and move to and the one that was the only option was beautiful and on the high end of expenses. When I

made it clear that the three of us children were much more concerned about his well-being now and not an inheritance, he softened in his own thoughts about moving. Those last two years of his life after moving were so much better for him, even though he was physically in end-stage heart disease. He had returned to the open hearted, gregarious man that we always knew him to be. Having great food, good company, his own apartment, and help when he needed it, was perfect, and leaving the home, while difficult, released some burden.

So, if communicating is a stress for you, work on bringing an open heart to each conversation with the intention to listen. My best advice about communication is to do heart-focused breathing (in the tools section) in preparation for conversations. Remember that what you may have as opinions and judgements may cloud your ability to invite true sharing in a conversation. Expressing what is true for you, without forcing or expectation, leaves the door open for further open communication.

What are You Creating?

Now let's talk about what's coming into your life.

What are you creating as you make this move? This is a time to celebrate who you have been in this home, and to look toward who you are becoming as you move into your new space. Some questions that you may want to consider are:

- Who have you been in this current home – what roles have you played?
- What changes have you been through in this home?
- Who do you want to be in the next chapter in your life? This is important – as you begin to name the qualities and experiences that you want to create out of making this move, you are living in intention. Intention creates what you pay attention to and you will have a much easier time “being” who you want to be and not get so caught up in the “doing” of all the things that need to be done as you undertake

this move. When you have created the qualities and experiences that you want to have as a clear picture it creates a flow and ease.

Celebrating!

Taking time to reflect and celebrate and say goodbye to the home you are leaving can be a great step in acknowledging the person you have been, and all the sweet and sour memories that life may have brought. In any life, the richness is brought by those people in our life who shared in it. So, have a party, take video, have a guest book for people to sign in and leave a note about one of their favorite memories in your home! Consider making a tangible memory in some way, either video, scrapbook, or quilt of your party and the memories.

If you would like coaching and guidance through your downsizing and move, **I invite you to consider The HeartMath Experience** – a self-paced class that you can do in short snippets to

practice evidence-based tools to help you balance your body, your emotions, and make clear decisions!

Go to www.EnergyM.org/downsizing for all of the details of the full program, the free webinar about the HeartMath Experience, and to receive additional free resources to get you started!

About the Author

Michele Mariscal, PhD

Michele Mariscal has 30 years' experience in the health and wellness field. She is a skilled facilitator in soft skills training and development. Her work facilitates individuals and organizations to thrive through heart-based learning. She has earned grief recovery and advanced grief recovery certifications through the Grief Recovery Institute. She is also licensed as a Trainer and Mentor through the Institute of HeartMath. Michele is also a four-time author with her most recent publication of *Growing Through Grief – The Alchemy of Healing from Loss*.



Chapter 4

The Art of Decluttering

By Marlena E. Uhrik, EdD

After “The Talk” and deciding about where to move, planning next steps in the downsizing process usually includes the next seemingly hard task of decluttering. The concept may seem clear, that there is a need to simplify or declutter because of the accumulation of years of stuff. The prospect of where to start, how to start, and when to start, can be overwhelming.

Why is decluttering so hard? There are tons of books, videos, systems and advice on how-to strategies, tools, and philosophy on what to do and how to do it. Will it be the Marie Kondo system of decluttering that involves touching each item and

asking, “Does it bring joy?” and thanking it and saying good-bye if it does not? Or is it sorting through things and pulling out duplicates and recycling them?

In my book, *The Secret Sauce of Staging*, I recommend starting small, by sorting through the proverbial junk drawer or nightstand or closet. It wasn’t until I took my own advice of decluttering my junk drawer that I realized I had accumulated over 15 water bottles from various places such as conferences, women’s races, and corporate trainings.

It’s not surprising that our sense of overwhelm and where to get started often takes over. Which system, philosophy or strategies do we use? The answer: the one that works for you! If you are not so inclined to do the task yourself, there is the option of hiring professionals who will help you. Luckily, we have experts among us who have perfected their methods and strategies for decluttering. Some people have become professional organizers and dedicated

themselves to helping others either by teaching them how to do it or getting in there and doing it themselves.

There is reason to believe that most of us do have some challenges. According to an article in the LA Times, the average American household of 4 has over 300,000 items! Is there any wonder, we are hesitant to get started? Not only are we faced with the sheer amount of “stuff” we have, there is the emotional component of decluttering---what do you do with your child’s report cards from elementary school that you have so neatly tucked away for safe keeping for the last 50 years? What about those precious drawings that your kids/grandkids did in kindergarten?

Once we identify your *why* or reason for decluttering in the first place, and a system that resonates with us, it becomes easier to make decisions -- easier to have less of an emotional charge on things as we exercise

that decision-making muscle. It's best to start as soon as possible.

Truth be known, decluttering should occur on a regular basis through our everyday living. That sounds good, but does it really happen? If you're like me, I have good intentions, but I do not declutter until things seem out of control---like our garage full of stuff (my husband's stuff!) Lol!

If we increase our awareness of the volume of stuff we have, we might begin by asking ourselves some provocative questions such as, "When was the last time I used this?", "Do I really need this?", "How does having this improve the quality of my life?", and "If I had only a few minutes to gather up my most important, precious things, would this be included?"

I have a friend who has refused to get overwhelmed by a closet stuffed with clothes and came up with a system that worked for her. She has a practice of rotating out and donating one piece of clothing for

every new piece of clothing that she buys. This is one of her strategies for maintaining her sanity when it comes to closet clutter. I like this idea!

But how do we let go of the things that conjure up memories from the past, especially when we are downsizing? Strategies for saving those precious memories include taking pictures, creating a photo album, and recording stories. One friend who took joy in having beautiful clothes and jewelry but had to downsize decided to donate her items to a non-profit organization that helps women transition from homelessness to job training and placement. Other organizations who thrive on donations are those that work with veterans, people overcoming addictions, people who are disabled and those down on their luck.

You can grab your copy of my book, *The Secret Sauce of Staging*, or many of my other books online today at www.AllWaysLearning.org.

Chapter 4: The Art of Decluttering

Chapter 5

Simplify Your Move

By Grace Bermudes, BA

Moving, Downsizing or “Rightsizing”?

Organizing Simplifies Your Life.

“I found it! The perfect house,” Marie texted excitedly! But, there’s a problem. “The house is much smaller than the house I’m living in. I’ll never fit everything into it, and how do I figure out what I really want and need?”

Maybe you and your grown children have decided that moving back home would be great! Only this time, they’re bringing their spouse and a baby. You need to figure out how to live in less space. You may be wondering, “How do I make less space truly work for me?”

It happens all the time! It's time to downsize.

When I meet with my clients for the first time, we look at how they want to live, what activities they will do in their space, and even how they like to store things. Whether you're downsizing, rightsizing, or clearing out and repurposing parts of your existing home, you need to look at these things too.

Here are my best tips to guide you through downsizing with the same **5 step process** I use with my clients when I help them organize their home:

Step 1: Before you begin

Step 2: Start with a plan

Step 3: Sorting through it all

Step 4: Refresh your new place with style

**Step 5: Unpacking and organizing into
your new home**

That's it! That's what I do. And it will work for you!

Step 1: Before You Begin

To make organizing easy and efficient, you need the right tools. And you need them where you can find them easily. Nothing is more frustrating than having to go back to the store you just visited because you forgot to buy sharpie pens for labeling your containers.

Assemble two tool boxes as follows. And yes, I do recommend actually buying tool boxes. They keep things organized and are easily moved around.

Tool Box 1 (basic tools)

- Hammer
- Assorted box of picture hanging hardware and wire
- Assorted Phillips and Flathead screwdrivers
- Measuring tape (at least 25')

- Wire cutters
- Pliers
- Needle nose pliers
- Small level (about 8’')
- Heavy duty scissors
- Paint brush
- All-purpose glue
- Razor blades
- Sharpie Pens
- Pencil

Tool Box 2 (office supplies)

- Scotch Tape
- Stapler and extra staples
- Staple puller
- Scissors
- Measuring tape (about 10’)

The Secret Sauce of Downsizing

- Sharpie Pens
- Pens and Pencils (At least 4 as they tend to disappear easily)
- Clear file folder tabs with inserts (easier to read)
- Assorted labels (i.e., 1 1/2" x 3", 2" x 4")
- Rubber bands
- Paper Clips
- Asst. Binder Clips
- Post-it Notes (Three Colors)
- Industrial Post-It Notes

Extra Items

- Low stool for sitting on
- Step ladder for reaching top shelves

Your contents can vary depending on personal preferences, but these are the go-to items that I always have on hand. Since you probably have most

of these items around your home, you can just gather them up.

Since you'll need an area to work, I suggest putting a small folding table outside the room you are organizing or using the dining table. This gives you a nice place to put your toolboxes and recycle bags, to collect paper to file, and to sort small things while sitting or standing. Sitting on a low stool when organizing low cabinets and shelves is a real back saver!

Step 2: Develop Your Plan

Your plan is your roadmap. It allows you to look at your move objectively and plan the most efficient way to organize your move or reorganize your home. Your plan does not have to be perfect. There will be surprises. Things won't happen on time, your favorite donation place may be closed, furniture will need to be taken apart, items will need to be repaired, or you may find strange goo on a shelf. Oh, the goo? It turned out that the little rubber caps

on the feet of an appliance were decomposing. I've seen this happen to old plastic-coated wire shelving and the handles on guitar stands. I always seem to discover new and intriguing things whenever I'm organizing a home.

If you are not yet sure of where you are moving or when, that's OK. It's never too early to jump in and get started organizing and reimagining your space. You can make space for favorite and new activities. Wouldn't you love a craft area, art studio, laundry area, or office? You can convert a bedroom to a craft room, or a dining room to an office.

I'm giving you some FREE Resources over on my website at the end of this chapter so go grab them. One of them is my "Downsizing Planning Workbook". Then on your calendar, pencil in any dates you will be out of town or unavailable, when you need to move and when you would prefer to move. Figure out free dump days, neighborhood pickup dates, and when your friends and family are

available to help. Start adding these to your Downsizing Planning Workbook.

Walk through your current home inside, outside, room by room. Without opening drawers and rummaging through things, take note on your Downsizing Planning Workbook, of the things that you are ready to donate, recycle, and the last resort “trash”. Put different color sticky notes on furniture that will work in your new home, furniture and things that are no longer needed, or need to be moved to another room. Industrial strength stickies stick better to rough items like the back of furniture.

Look at your list. Where will the things you no longer need, want, or have room for go? Realizing that no one else may want an item, even for free, can be very difficult. Sometimes you simply need to take a deep breath and let it go. One client was cleaning out her mother-in-law’s house. She had 2 pianos, a Baldwin and an antique grand. No one wanted to buy them. Eventually the family decided to donate

them to the local college. Even the antique grand that her brother-in-law said was worth \$25K!

On larger items, write the name of the charity, person, storage, or new address of an item's destination on the post-it notes and in your workbook. This helps you keep track of all the large items, and then gather them up when you're ready to take them to the appropriate donation spot or person. Since you've already checked and added this information on your Downsizing Planning Workbook, you know when these donation spots are open.

If you're sure that something shouldn't be recycled or thrown out, but you're unsure about where an item might be best used, think outside the box. You can go to recyclestuff.org to get ideas of who may be able to use an item. Sometimes it takes a "little" more creativity to find things a home, but it's better for the environment and your peace of mind. You can take a photo of an item and send the photo to all

your relatives and friends. The first to respond gets it. Sometimes you just have to make some phone calls. When trying to find new homes for a bunch of books, I called until I found a library that really needed books for its shelves.

Step 3: Sorting and Organizing

The truth is, you either sort and organize before you pack or when you unpack. Organizing and sorting before your move saves you time and money because you won't pay to pack, move, and unpack the things you don't want. If the movers pack up EVERYTHING, you're left sorting through mountains of boxes of stuff when you move in. If you have the time, sort before.

When possible, work room by room or area by area. Of course, there will be some overlap. One of the goals of organizing is to put everything where it is needed. Choose where you want to begin. Start by organizing the storage areas in that room or area first, this will give you more space to put things

away. If you don't need items before your move, you can pack as you organize.

For example:

- If you're organizing the whole house, start with the garage
- If you're organizing the bedroom, start with the closet
- If you're organizing the kitchen start with the pantry

Label three bags or boxes: DONATION, RECYCLE, and TRASH. Have some different sized containers on hand for sorting smaller items. If you are organizing a workshop area, flat boxes would be very useful for sorting tools.

First start by creating an area to work. I use a folding table, but you can use an existing table, or even the bed. If you are going to sort things on the bed, cover the bed with an old sheet to keep the dust off your bedspread.

If you're organizing a closet, start with the top shelves. Take everything down and out of the closet, and put it in the sorting area. Clean the shelves as you empty them. Move along quickly, putting like things together in your sorting area. When sorting drawers with a lot of little things in them, it is easier to remove what you want, and throw out the rest. Stack all your papers in one place. Later on, you can organize all your papers at once. Next, decide what will be stored in this space and put the appropriate things away as you go. Continue organizing all parts of the closet and continue organizing the next wall (either to the left or right) working from top to bottom, cleaning as you go. Put donations into the car right away and drop them off as soon as possible.

Keep an eye out for these sorting conundrums:

- Too much of a good thing i.e., Tupperware, socks, cosmetic samples, travel sizes
- Things in need of repair- repair now or let it go

- Things you don't love, don't like, don't fit, or don't look good on you
- Things that belong to others, past their expiration date, or never used

Step 4: Refresh Your New Storage Spaces with Style

Whether you're moving or refurbishing, remember storage does not have to be boring or ugly. Why not make it beautiful! Spiff-up storage areas with shelf paper and/or paint. A great trick for removing old contact paper is to heat small sections with a hair dryer and lift it off as you go.

Poor closets! Their interiors usually get painted an off-white color and are never repainted again. Why not paint the closet the color of the room, a stand out accent color, or a flattering neutral shade? The shelves can be painted a different color than the walls or you can cover them with shelf paper.

Beautiful prints, including scented ones are still available on line. Remember to allow plenty of time

for the paint to dry before putting things into your closet.

Find more storage space by looking up! Is it possible to add another shelf or raise one hanging rod and put a second rod below? If there is a lot of space above your closet shelf but adding a shelf is not a possibility, use modular storage containers that you can stack on your shelf. This is a great place for hat boxes, containers for dressy shoes, or out of season clothes. You can hang hooks or pockets on the back wall or sides of your closet for belts, scarves, long necklaces, etc. There is plenty of room, and it is easy to reach in and grab what you want.

Although you can use many different types of containers, I prefer containers that are easy to open and close. If it is too difficult to open them you won't use them. Modular boxes with straight sides take up less room on shelves. Even if it is a clear container, label them. Make the labels big and bold enough to easily read even on the highest shelf.

If it is possible to return the unneeded storage boxes, I recommend purchasing all the containers you think you will need ahead of time and putting them together in one area. When choosing your containers think about how you like to store things. For example, how would you like to store your clothes? For my clothes, I personally like felted hangers, jeans and sweaters on shelves, and jewelry and scarves on hooks. All of my shoes are kept in the downstairs shoe closet. Not all containers work well. Be choosy, and if one type doesn't work, try another.

Yes, keep a container for your memorabilia. Digitizing photos and videos save space and you can hire someone that specializes in that. Be sure to be aware about how your photos are stored since the types of media used continue to change. As time progresses, you may need to update the type of storage you use. That wedding VCR recording you have should be updated to a Blu-Ray.

Making sure that packing boxes are labeled correctly is important. The labels must say what is in the box and what room it will end up in. If you are unsure where it will go, write which room it came from. I don't recommend letting the movers unpack, they don't have the time to ask you where things go. It is much more efficient to hire an organizer or do it yourself.

Step 5: Unpacking and Organizing Your New Home

In advance, decide on a place, a spare room or the garage, where you can stack boxes with things you want, but you aren't quite sure where they will go. No matter how organized you are, you will most likely have some of these. You can unpack these boxes later. You will also need an area to store empty boxes as you unpack them. Break them down as you go to save room. Supervise the placement of boxes and furniture so they end up in the right rooms. Start unpacking the larger boxes of clothing,

lamps, and large items immediately. Hopefully the movers can take away many of the large boxes.

These tend to unpack quickly, clearing areas fast.

Prioritize your bedroom. Make sure you know where your bedding is so that your bed is set up and ready for sleep. After a full day of moving, searching for your bedding and making your bed at 2 AM is not fun.

As you unpack, place each item where it makes sense. Put items where they are easy to use and easy to reach. As you are organizing:

- Look out for inefficiently used space
- Things that don't belong there
- Pay attention to accessibility, frequently used items should be front and center
- Containerize little things that fall over easily
- Higher shelving in cabinets and pantries should be used for items that are not used as

frequently like birthday candles and holiday
serve ware

If you decide that you don't want to do the
organizing, you find organizing overwhelming,
organizing isn't in your wheelhouse, or if it just isn't
the highest and best use of your time, hire a
professional organizer like me.

**If you get a bit stuck or have a question, you can
contact me anytime through my website at
www.GraceBermudes.com.** That's where you will
also find the Downsizing Planning Workbook that I
promised you, including 10 BONUS Organizing
Tips, just go to
www.GraceBermudes.com/downsizing for that. I
promise it will help you. Also, on that page is a link
to join my Facebook organizing group. It's a group
that I started that's all about organizing and making
your home beautiful!

About the Author

Grace Bermudes, BA

Grace graduated with honors from San Jose State University with a B.A. in Environmental Studies and a Teaching Credential. While raising 4 kids, Grace was inspired to launch her professional organizing business,



Check It Off Your List. Since 2007, she has organized everything from homes, offices, garages, and classrooms to barns. Grace's expertise also includes a Certificate of Floral Design, creating flowers for weddings and receptions, as well as remodeling and building new homes. Her current project is a Lake House to be completed this year.

Her definition of the word "Organized" appears in the International Best-Selling book, *Itty Bitty Book of Words*.

Her unique approach to organizing is why clients across the nation work with her.

Chapter 6

“But I Love All My Stuff”

By Mishele Vieira, CPO®

There are some people who just love to get rid of things. They are constantly cleaning out and purging. Forget about “If I haven’t used it in a year.” For these folks, if they haven’t used it in a month it’s gone. This chapter is not really for them, although they are certainly welcome to read it and may gain some understanding about us “savers”, and perhaps a few smiles.

Loving your stuff

The truth is, I don’t really meet or work with that many people who truly love their stuff. They love some of it, but usually they woke up one day and said, “Where did all of this stuff come from?”

They dread the thought of downsizing because they have no idea what they would ever do with all their stuff. So instead, they remain crowded, and don’t move out of a space that is no longer right for them, just so that they don’t have to deal with all their stuff.

For many of us, it is hard to let go of our stuff. And here are four different types of scenarios I often encounter with people when helping them with the downsizing process:

1. Utilitarian – “Why should I get rid of something that is still good?” “I paid a lot of money for this.”

Many people have a hard time letting go of things that are perfectly useful, like sports equipment, electronics, gadgets, etc. This thinking often comes from a utilitarian value system in which people don’t want to be wasteful of money and/or resources.

It is common to find unopened “fancy” soaps, unused kitchen appliances, unopened bottles of wine or liquor (the good stuff) and, other never used items in the home of someone who has utilitarian values. Many times, these were received as gifts that were never put to use.

I’m always a little sad when I am helping clear the home of a decedent and we find these unopened items that were being saved for that “someday” that never came.

Tip: Yes, you could still use these items, but will you? The likelihood is very low. But if you release them sooner rather than later, the likelihood is high that someone else will make good use of something that you are probably never going to use.

2. Emotional – “This makes me sad.” “I’m going to cry.”

The overwhelming thought of having to downsize their stuff is just too much for some people to think about. Or they may be sad about leaving a place that they love.

Sometimes the stuff represents a goal or a dream that might not have come to fruition.

Case Study: I once worked with a woman who wanted another child and was unwilling to release any baby items from the previous child, even though the family was preparing to move to a much smaller home. The sadness around not having that dream come to fruition, made it too difficult for her to address the baby items that were all over the house and the garage.

Solution: As a result, we packed up the baby items which by now were somewhat dated and obsolete, but probably ultimately ended up in the new garage. The baby stuff became a point of contention in the marriage, and

something the couple continued to fight about.

3. Sentimental Attachment – “This was my mother’s”, “It’s been in our family for 30 years.”

Sentimental attachment usually relates to something that is connected to someone else. That lamp, rug, mug used to belong to someone we love/loved and so we think we should keep the thing(s). Sometimes it’s out of obligation. We didn’t really like the person, and we don’t really like the thing, but because the person it used to belong to has passed on, we now need to keep it. It is disrespectful if we don’t.

Sometimes we have sentimental attachment to things of our own that are from another lifetime, clothes that used to fit or we wore at a job we loved and felt successful. Or sports memorabilia from the good ole days when we

used to play, and remind us of a time when we were more active, in shape, etc.

Tip: Although you are not going to forget them, it is sometimes helpful to take pictures of the items and then let them go.

It’s pretty easy to understand how someone who has utilitarian values or is emotionally or sentimentally attached could have a hard time letting go of things in order to downsize. But sometimes there is *Something Else* making it hard to downsize.

- 4. Something Else –This could include a brain-based condition such as ADHD, anxiety, depression. In all these cases, it is likely to be harder for the person to downsize.**

If you are trying to downsize and are grappling with “something else,” I recommend that you get some help in the downsizing process. It will benefit you greatly

to have a supportive, patient person (not a judgmental, impatient, family member) to help you, because making decisions can be very difficult and overwhelming for people dealing with these conditions.

Here are some potential places to get help:

- Friend
- Supportive, patient family member
- Neighbor
- Professional Organizer
- Senior Center
- Senior Move Manager

It can also be very useful to have the help of a mental health professional who can help you to process some of the emotions that are coming up as you navigate the downsizing process.

Case Study: Suzie is extremely gifted and accomplished in her profession and has ADHD. With the downsizing process, she does not know where to begin. Additionally, there is difficulty in recognizing the similarities of items in order to sort and then reduce the items. Once she finally decides where to begin, she soon becomes distracted, moves on to another room without completing the previous activity therefore creating the appearance of a mess.

Solution: This "ping-ponging" strategy will make it very slow to see progress and make Suzie feel discouraged in the downsizing process. It would be beneficial to have a helper to first sort the items, make decisions, and keep her on task. For example, pre-sorting all the linens and recommending which items can be released.

Case Study: Jeremy worries about things more than many people. He is afraid that if he downsizes, he might need the things later, or worse, something bad might happen. His friends and family tell him “stop thinking that way,” “Don’t worry about it,” but he can’t help it. Jeremy has anxiety.

Solution: With someone experiencing anxiety and trying to downsize it is important to listen to their concerns. Ask how you can be helpful. Sometimes just being there while they do the work is help enough. Talk to them and provide reassurance if necessary. If packing, use clear containers for the items they are most concerned about, so they can see their things.

Case Study: Emma is a 78 year old retired executive, and she has lived in the same house for the last 45 years. She loves to collect things and has always had an interest in a wide

variety of hobbies. Her house was always very neat and well maintained. This all changed after suddenly losing her son in the Iraq war. 5 years later she lost her husband after a long battle with Parkinson's. Now her house has become full and she seems unable to release any of the many items that have accumulated since these two tragedies. But her failing health is forcing her to downsize and move to a transitional living facility where she can get some help managing her medical challenges.

Solution: Acknowledge how difficult it must be for Emma. Establish ground rules and guidelines that she and you will commit to. Reassure her that this is her home and you won't remove any items outside of the guidelines without her agreement. Be patient and kind, and know that this process may take a considerable amount of time.

***Additional TIPS for somebody dealing
with “something else”:***

- Create a plan
- Focus on one thing at a time
- Finish a task before starting a new one
- Remember we are trying to minimize the overwhelm and stress

All the reasons why it is hard for people to let go are completely valid. Still the truth is that we have embarked on this journey and made the commitment, (at least in our minds), that we are going to start to downsize our stuff. Some of us are doing it just because we have had enough with the stuff, and some of us are doing it because we are preparing to move out of our current home.

Whatever the reason we are hanging on to things does not really matter. The important thing is...that you have made a commitment to downsize, either because you are moving, you don't want your kids to

have to deal with it all, or perhaps you are just ready to live with less stuff.

So how does someone who doesn't love to get rid of stuff downsize with the least upset possible?

Start Early because:

- Downsizing can be time consuming and exhausting
- Minimizes stress and anxiety, pressure
- Enables you to go through your things the way you want to
- Allows for time to begin to release, and in some cases grieve, which leads to a smoother transition

How to decide what to keep and what to release

Start going through your things. You can do this room by room, or by category. The latter is preferred because it will help you to see how many items in the category that you really have. And when you see how

many that you have, it will (hopefully) be easier to let some of them go.

You'll start with the stuff you know you *need*, which often are things like basic appliances, the dishes you use all the time, pots and pans, linens, blow dryer.

Next...

Pick out your favorite things. These are the gems: stuff you might not necessarily need, but they are things you love. They just make you happy and you don't want to live without them. This should be the best of the best. **Be Very Selective!**

The reason why we start with our favorite things is so that we can honor what matters most and make room for them. This will also determine how much space is available for the rest of the stuff, either in the current space, or our next destination.

Next...

Place the remaining items into two categories. "No," and "Maybe." Do this quickly. Go with your first choice. Try not to change your mind.

Ready for the fun part? The maybes are actually no's! If they are not a "hell yes," then they are a no. Let them go! Remember, we are downsizing.

Tip: Remember the Pareto Principle: The 80/20 Rule states that, for many events, 80% of the effects come from 20% of the causes. For example, you use 20% of your things 80% of the time. You wear 20% of your clothes 80% of the time.

So, all of that other 80% that you have not been using or wearing, is not going to all of a sudden start getting used or worn when you move. Let it go now.

What to do with the rest of your stuff:

Give Away – to Family and Friends

This can be wonderful if done with a little planning and organization. There are plenty of people that you know who would benefit from having some of

your stuff. Ask your family, friends, and people in your community.

Case Study: Angela was a friend whose vibrant energy and spirit positively affected all those that she knew. She was known for her scarves and jewelry, all made from exquisite gemstones and jewel-tone colors. When Angela passed away unexpectedly, her beautiful accessories were artfully displayed at her memorial reception. Each friend was invited to select something that they now wear and help us all to remember this wonderful woman. How nice would it be if we were able to do such a thing with our treasured possessions while we were still alive?

Donate – There are so many charities that will take your things for the purpose of redistributing or reselling. It used to be that some people could get a tax benefit from donating items “in-kind.” This may or may not apply to you now but hopefully you will get immense personal satisfaction in knowing that your

stuff will be passed forward to someone who will benefit greatly from having AND USING it.

Sell – Many people like the idea of getting compensation for the items they spent so much money on and are now downsizing. While this is certainly a viable option, it is often very time consuming and does not return the amount of money that one was hoping for. You may be better off donating and trusting that it is going to do good work in the world.

Keeping your Eye on the prize...The next phase

Okay, so we have successfully completed the downsizing process and now we are in our new space, or place. What now? Now hopefully the intention will be to keep it that way and enjoy our new life without the burden of all that stuff that we downsized.

This is going to require that you be very selective about what you bring in. When at the store, or when someone is trying to give you some stuff (because

they are downsizing, LOL, give some thought to what you are going to do with it, and where it is going to go in your current space. Remember: You don't have to buy it or bring it home.

Tip: One thing in, one thing out rule: If you do bring something in consider letting something else go. This will help keep things at the quantity where you left them when you downsized. If you notice things starting to fill up again, release 2 items for every one that you bring in.

Make time at least every month to review your stuff and make sure that what you have is still what you want. I think you'll find, the more you practice downsizing the easier it gets.

Downsizing can be a difficult and sometimes upsetting process. But the rewards you'll reap from having less, and only stuff that you need and love, are ultimately going to outlast the temporary discomfort you'll feel during the downsizing process.

If you would like to have a complimentary consultation with me about your organizing projects or family dynamics on some level about downsizing and letting go, please contact me through my website at www.AwayWithChaos.com/downsizing. I've also created a free resources page just for those of you reading this book where you'll get access to my "No Nonsense No's" checklist on what to say NO to, as well as some options of places where you can sell your stuff. Just go to www.AwayWithChaos.com/downsizing.

About the Author

Mishele Vieira, CPO®

Mishele launched *Away With Chaos* in 2002. She helps busy people and those experiencing life transitions. Mishele has a deep passion for working with people with brain related conditions including ADHD, anxiety, depression, addiction, and other behavioral health conditions which can make it harder to get and stay organized.



As a speaker, writer and active member of NAPO (National Association of Productivity and Organizing Professionals), Mishele was the first in history to earn the official Certified Professional Organizer (CPO®) designation in 2007. Her workshop “Managing Chaos” teaches how to keep chaos from *seeping* back into their home, work and life.

Chapter 6: “But I Love All My Stuff”

Chapter 7

Gratitude

By Marlena E. Uhrik, EdD

For those consciously choosing to live the best version of themselves, the following checklist is what I typically live by - see what you think!

My To Do List

- ✓ Count my blessings
- ✓ Let go of what I can't control
- ✓ Practice kindness
- ✓ Listen to my heart
- ✓ Be thankful for what I have
- ✓ Just breathe

Just think what it would be like if this was our To Do List from the beginning! And now at 55+, we can reflect and decide how this portion of our lives will be played out.

Often, we focus on the things that we don't like about our life or the things we don't have. It's interesting how having a sense of gratitude or thankfulness changes one's perception of life. It seems like there comes a time in life when it's the small things that light us up. As we become more aware and appreciative of the things we have, our lives get fuller and take on deeper meaning: things like a child's smile, a puppy dog's breath, a beautiful sunset, the astonishing site of the moon, the laughter of friends and family. Living in a society where more is often seen as "better," it takes something to not get caught up in wanting more and more. And at some point, we find ourselves satisfied to wake up every morning, feeling in good health and greeting a new day. We are thankful for another day and

experience living in the moment. This is gratitude for a life lived with fullness and abundance.

I have read this poem by Erma Bombeck at different times over the years. It seems fitting to add this here to help express the thoughts and feelings of what it is like to look back and consider another way of looking at things with a different perspective.

IF I HAD MY LIFE TO LIVE OVER - by

Erma Bombeck

(written after she found out she was dying
from cancer)

I would have gone to bed when I was
sick instead of pretending the earth
would go into a holding pattern if I
weren't there for the day.

I would have burned the pink candle
sculpted like a rose before it melted in
storage.

I would have talked less and listened more.

I would have invited friends over to dinner even if the carpet was stained, or the sofa faded.

I would have eaten the popcorn in the 'good' living room and worried much less about the dirt when someone wanted to light a fire in the fireplace.

I would have taken the time to listen to my grandfather ramble about his youth.

I would have shared more of the responsibility carried by my husband...

I would never have insisted the car windows be rolled up on a summer day because my hair had just been teased and sprayed.

I would have sat on the lawn with my grass stains.

I would have cried and laughed less
while watching television and more
while watching life.

I would never have bought anything
just because it was practical, wouldn't
show soil,
or was guaranteed to last a lifetime.

Instead of willing away nine months of
pregnancy, I'd have cherished every
moment and realized that the
wonderment growing inside me was the
only chance in life to assist God in a
miracle...

When my kids kissed me impetuously, I
would never have said, 'Later... Now go
get washed up for dinner.'

There would have been more 'I love
you's, more 'I'm sorry's.'

But mostly, given another shot at life, I
would seize every minute;

look at it and really see it; live it and
never give it back...

STOP SWEATING THE SMALL
STUFF!

Don't worry about who doesn't like you, who has
more, or who's doing what.... instead,
let's cherish the relationships we have with those
who do love us!

**Find out about Marlena's books online at
www.AllWaysLearning.org and her *Secret Sauce
of Staging* book and services online at
www.Amazing-Staging.com.**

Chapter 8

5 Steps to Downsizing with Mindfulness

By River Easter, MA

At first, when asked to be involved in this book, I thought, “What expertise do I have to offer about downsizing?” Do you ever say this to yourself and downplay your natural gifts and talents? You are not alone. It is a common affliction of smart, intelligent people. But, after some thought, I realized, “Hey, wait a minute, I’ve moved 18 times since I got out of college when I was 27 years old.” I didn’t even want to think about all the times I’ve moved since leaving home at the young age of 17. I’ve moved a lot! I have learned some things in the process. The most important thing I’ve learned is... The more you

have, the more boxes you have to pack, lug upstairs, and pay for to have moved or put into storage.

The cost, physically, monetarily and emotionally really hit home when I moved across the state from my 4,400 square foot home, to a home I shared with another family that was around 1,700 square feet. I spent weeks and weeks packing, then lugging all of my family's stuff three hours across the state. I moved from a huge home into basically two bedrooms. Most of our possessions were put in storage. Then, we ended up purchasing a home and moved all of those boxes again into the new home. We turned around and reversed this process five years later- moving back to the foothills and into a 3,000 square foot house. Needless to say, it was physically and emotionally exhausting. My belongings were a burden and weighed me down. I yearned for less—less things and more ease. I was really ready to downsize. This was my motivation for downsizing my life—my “Why-” my new era of “less is more.”

“Simplify” became my **guiding principle**. I began taking small steps to downsize and, in the process, I discovered ways that supported me. The following are simple and effective practices, based in neuroscience, to support you in creating more ease, joy, and spaciousness in your life.

Step 1: Vision

“What you think, you become. What you feel, you attract. What you imagine, you create.” - Buddha

Visualization is a powerful tool employed by many successful people to achieve the results they want. Richard Branson, Jim Carrey, and Oprah are a few examples—and there is research to back them up. Your mind doesn’t know the difference between a real event and imagined event. Think about all of the “what if” events you have imagined—they got your emotions going and stimulated more images and emotions. Most of the time, we are using this amazing power against us. We are imagining all of the things that could go wrong and are suffering

from related emotions of fear, worry, and dread.

Why not use the power of the imagination to imagine exactly what we would love to have happen, to imagine a future we are longing for?

Practices:

- **Why do you want to downsize?**

My “Why” for downsizing was to create more ease and simplicity in my life. I wanted energy to focus on things that mattered to me. I realized that everything I owned required not only maintenance of some kind, but it required emotional energy. Spend some time reflecting on why downsizing is important to you. Write it down as a statement.

My why for downsizing is: _____

- **What is your vision for your new space?**

Are you yearning for your home to look, feel, and provide something special for you? I wanted my home to feel like an oasis. I

wanted to walk into my home and feel a sense of relaxation and calm. I imagined myself walking into a beautiful garden or spa. I would feel a sense of calm, relaxation, and peace in my body- a place that inspired and nourished my body and soul.

Take the time to ask yourself, “What would I love my home and environment to look like? Feel like? Smell like? How would I like to feel when I walked into my home? What elements would be in my home?”

Let your imagination run free. If your mind starts saying, “That’s not possible,” ask yourself the question, “What if it were possible to have my home and environment look exactly how I would love? What would it look like?”

- **Write your vision down.**

It’s really important to write your vision down. This activates your brain in a positive

way to begin searching for ways to achieve your vision.

Amplify your vision by finding images of what you would love your new space to look like. Put them up on a poster board and/or use digital images on your computer.

- **Visualize or mentally rehearse your vision daily.**

Visualize living in this new space that brings you joy, happiness, and ease in the morning and at night.

Ninja Tip: First thing in the morning ask yourself “What would I really love to accomplish today?” Focus on would I “love” versus what I “should” or “have to” accomplish. The more you visualize what you would love to accomplish, the more you will want to do it.

Write a list of 1-3 top priority tasks for the next day the night before! Before drifting off to sleep imagine accomplishing those tasks with ease and how good it feels to have those tasks accomplished. Smile while you are imagining it.

Step 2: Support

“Sometimes asking for help also means you are helping yourself.” – Ranuka Pitre

From a young age, I was encouraged to be independent, resourceful, and self-reliant. These are wonderful traits and helped me to be successful. However, it gave me the unconscious message that asking for support was a sign of weakness. The underlying assumptions were, “If I get support it means I am ‘less than’ or ‘I’m burdening them.’” Another one is, “I will have to reciprocate and what if I can’t.” However, the truth is we can’t do everything on our own. We need the support of others. Otherwise, we feel overwhelmed, exhausted

and all alone. Think about how good it felt to help out someone. You are giving someone the opportunity to give. And you have the opportunity to be a gracious receiver. Be bold and ask for support!

Practices:

- **Make a list of where you would love to have support.** (Hint: What don't you like to do or get stuck doing?) Meals? Packing? Help in selecting what to keep and what to toss?
- **Write a list of people to support you in this process.**
- **Make a list of potential accountability partners and invite them to be your accountability partner.**

Ninja Tip: Schedule and place a high priority on these accountability calls. Do not miss them! Tell your partner to hold you accountable. We are highly motivated to

complete a task if we are reporting to another.

This is why coaching is so effective.

Coaching provides both structure and accountability.

Step 3: Small Steps

“The man who moves mountains begins by carrying away small stones” - Confucius.

It is the consistent, small steps that will support you in achieving your goal. It is easy for your mind to go into overwhelm looking at the big picture. If you break a big project into manageable small steps, it becomes much more doable. Start with one drawer. It is easy to feel overwhelmed when you look at your entire house or project. Breaking it down into bite size pieces will help you get started and feel successful.

Practices:

- **Write down the steps you need to take to move yourself in the direction of your**

vision. You can use a checklist. There are many free resources on the Internet for downsizing and simplifying. If overwhelmed, start with what's right in front of you!

- **Break these tasks down into bite size pieces.** For example, I recently helped move my 20-year-old into their first apartment. The checklist was daunting and had me in overwhelm. I asked myself, "What do I need to do first?" I separated the list into things we had and were moving to the new apartment, and the items we could buy after the move across the states.
- **Visual people need visuals!** I highly recommend visual people employ some type of visual checklists. Examples are sticky notes on a calendar. Steven Covey, in his book, *7 Habits of Highly Effective People*, recommends a quadrant-based to-do approach, using importance and urgency. You can write your

to-dos on 3x5 cards and put them on a poster board or on the wall.

Ninja Tips: Place the sticky notes or 3x5 cards on your “Successes List-” anywhere you can see and refer to them. This will motivate you to accomplish more tasks!

Reward yourself after completing 1-3 tasks during the day. This will motivate you to accomplish more tasks.

Step 4: Overwhelm, Procrastination and Perfectionism—Use the power of neuroscience to get unstuck!

“The dread of doing a task uses up more time and energy than doing the task itself.” Rita Emmett

Procrastination is one of the most common self-destructive behaviors. Research shows that almost everyone does it to some degree. Procrastination usually is about fear, low-self-esteem, and self-doubt. The introduction of computers, cell phones, and all

of the constant notifications that go along with them, amplify the procrastination impulse. Clutter is another big distraction and a sign of unmade decisions.

Being paralyzed by perfectionism is another form of procrastination. It is tied to not wanting to fail and the fear of being imperfect. Many of my clients don't even realize they are in "perfectionism paralysis." For example, I am a person who doesn't want to throw things in the trash and see them end up in the environment. Therefore, if I don't know where to recycle an item, I tend to ignore it or let it stop me from moving forward. I get stuck.

Yes! These little things really stop me at times! If you are even thinking of judging me, remember, this is a "No Judgment Zone!" That is part of mindfulness—to not judge yourself. Saying how "stupid" you are for getting derailed "over an earbud" is not consistent mindfulness.

Overwhelm is another common way to keep you stuck and not moving towards your goals. Usually people stop or avoid because the task seems so daunting.

Practices:

- **Notice how you are feeling and what thoughts you are thinking without judgment.**
- **Write things down.** Our mind will relax when we write things down so we don't forget. If we can't sleep at night worrying about forgetting something—get up and write it on a note or in a list. Writing moves us out of the part of the brain where worry, procrastination, and self-doubt are, to the part where optimistic decision making resides. (M. Waldman and C Manning, PhD.

NeuroWisdom: The new brain science of money, happiness, and success. Diversion Books, NY, NY 2017)

- **Write a list of all the reasons why you are avoiding doing that task.** You will generally see a pattern as to why you are avoiding a task. It might be because it feels overwhelming. If so, use the process on overwhelming. If it is about fear, ask yourself if this fear is really real? What action steps can you do to mitigate this fear? For example, the fear could be not knowing how to do something, or not feeling capable or good enough to do the task. Can you ask for help? Someone else might have the answer. Break the steps down into small steps. Take on a task that feels the easiest. This can “grease the wheels” and help give you momentum to complete harder tasks.
- **An excellent technique when you are overwhelmed is to do a mind map.** A simple mind map is taking a piece of paper and, in no particular order, start writing down everything that is going on in your head on a

sheet of paper- tasks, priorities, phone numbers, deadlines, etc. List all those things that are in your head that are causing you overwhelm. Now, begin to see how items or tasks are linked. For example, you might see how boxes are related to downsizing your guest bedroom. Once you see the links and relationships, you can begin to make a list, identifying priorities and next steps.

Ninja Tips: Remove distractions! Turn off your cell phone and other distractions.

Work for only 5 minutes. Take a 5-minute break and work for another 5 minutes. Repeat until you are feeling productive.

Reward yourself with a cup of tea or a walk for completing a task. Rewarding yourself on a constant basis works!

Step 5: Mindfulness

"There are only two ways to live your life. One is as though nothing is a miracle. The other is as though everything is a miracle." Albert Einstein

Mindfulness is awareness of your thoughts and feelings without judgment. Think of mindfulness as a continuum. When you are consumed with deadlines, a crisis, or stress in general, you may find yourself at the low end of the continuum. The good news is that you can always enhance your mindfulness. The more you practice the easier it will become. Amplify your mindfulness mindset with the following practices.

Positive Thinking

We think an average of 70,000 thoughts each day, the majority of which we use to terrorize or berate ourselves. We say things to ourselves we would never say to a friend. These thoughts actually release chemicals that affect our emotions and energy. They have an impact on our actions and our results.

Negative thinking causes us to suffer. Most of us are so desensitized to this negative thinking and we aren't even aware of it.

Practices:

- **Notice what you are feeling and thinking.**

For example- are you feeling anxiety, doubt, fear, worry about what ifs? Notice what you are saying to yourself. Maybe it's, "I don't feel like I can do this." or, "What if my friend finds out I gave her gift away?" Or "What if I need this in the future."

- **Choose an empowering, kind, or life generating thought.** Choose a thought that is empowering, and in alignment with you and your goal or vision. For example, choose, "I can figure this out" rather than "I don't know how."

Ninja Tip: Say to yourself, "What if this is what it looks like while it's all working out?"

Self-Care / Rest

There is more and more research pointing to how important rest is for your health and well-being.

Prioritize your sleep and get 7-8 hours each night.

Take a 20-30 minute nap in the afternoon.

Eat brain power foods and drink plenty of water

Making decisions and using your brain uses lots of energy. Your brain never rests. Even at rest, it uses 20% of the energy your body produces.

Practices:

- **Eat foods for brain power such as green, leafy veggies, walnuts, fatty fish like salmon, and berries.**
- **Drink plenty of clean, filtered water.** Add a squeeze of lemon to receive even more value.

Ninja Tips: Have someone make healthy brain power meals for you during your move.

Make up nourishing meals before you move.

Gratitude

Gratitude is an appreciation for the tangible and intangible in one's life. Research correlates gratitude with improved health, emotions, relationships, and well-being. The practice that I recommend for my clients is to write "10 things you are grateful for" each morning.

Practices:

- **Focus on what you are grateful for when you notice yourself complaining.**
- **Thank others verbally, written, or mentally.**
- **See the good in your circumstances rather than focusing on the negative.**

If downsizing is stressing you out and you'd like more support in this 5 Step Process, I would love to support you. **You can download a Free Guide: Mindful Steps to Downsizing along with a few**

other resources available to you online at
www.RiverEaster.com/mindfulness. You can
also just schedule a FREE Breakthrough Session
with me at www.ScheduleTimeWithRiver.com and
we can do this together.

About the Author

River Easter, MA

River is a Certified Life Master Consultant and has a Master's in Organization Development.

Working within various sectors she has developed effective tools and strategies for providing collaboration,

process improvement, strategic planning, facilitation, leadership and innovation.



For over 20 years, she has studied transformation success principles. Taking an integrated, holistic approach, River combines her life experiences and broad background of studies with academic theories in systems thinking, emergent processes, quantum theory and neuroscience.

River lives in a Northern California Sierras with her husband, dog and cat. She loves hiking, cycling,

kayaking, or just sitting in her backyard watching the birds.

Chapter 9

Comparison Case Study: Planning vs. No Planning

By Laura Segura

My parents, for the most part, did everything right. They downsized from the house I grew up in as a family of five to a small, 950 square foot (sf) condo in their early 60s. They had intended to live out their lives in the condo and never purchased long-term health insurance. As my mom would often say, “We didn’t expect to live this long.”

From as far back as I can remember, my mom planned for their impending deaths with little emotion and a truckload of practicality. If one of her children expressed an interest in a painting or knick-

knack, she'd ask, "Would you like that?" or "Do you think your brother would like that?" She spent many an evening combing through her well-organized files, getting rid of old warranties, personal mementos she didn't think anyone would want and generally eliminating anything she thought would leave a 'mess' for her children to go through when the time came. We knew we were lucky.

At the age of 100, my dad fell and spent a week in a convalescent hospital. From there he was moved to an assisted living facility from which we knew he would not be coming home. My mom, who was 97, faced her new reality with as much of a positive attitude as she could muster. The nearest sibling lived a two-hour drive away, making commuting to help my mom an impossibility.

If you are not familiar with how these transfers from convalescent hospitals to Board and Cares, or Board and Cares to Board and Cares work, it is a tricky business to say the least. While in the hospital, we

were contacted by someone who makes these arrangements. She scouted the areas looking for facilities where a bed was available. They ran, in my parents relatively low to moderate income level neighborhood, about \$4,000 - \$5,000 per month for a shared room. You need to pay in advance and provide two-week's notice if you plan to vacate. To move my dad to my sister's area of the city required first, finding an open bed near her, then giving notice to his current residence as soon as possible to avoid overlap in the monthly fees. I share this because, when we found the bed we wanted, we had to give notice and then vacate the bed where he was at in 30 days. That meant my mom had to move, complete with all her possessions, to a single bedroom within my sister's house within that short time frame.

She faced this move with grace, stating that there wasn't much she wanted to take with her. It was difficult to have conversations regarding the move, as she expressed little interest in anything that didn't

involve sitting by my dad's side. In the evenings she watched as we boxed and packed the physical representations of their 75 years together, trying to determine what would be essential to her new life, and what would be discarded.

My sister and brother-in-law did a wonderful job of decorating her new room using furniture from her old bedroom; decorating its walls with photographs of grandchildren and great-grandchildren; posting hand-made art work; photographs of my dad; and favored trinkets - anything they could think of to make the transition easier. They also had to revamp their guest bathroom to include safety bars in the shower and install a heating unit to prevent my mom from getting cold.

As the days turned into weeks, and in spite of her initial willingness to 'let things go,' my mom would think of one thing or another that she 'had to have.' She often expressed frustration at having packed so quickly and worried we had thrown or given away

something she'd had her heart set on. On occasion, she'd insist that we'd disposed of things she cherished, despite originally having expressed little or no preference for them. Patience was difficult but essential!

In contrast, I was the Executor for my aunt and uncle who had no children, and passed away in their 90s. Their wish was to stay in their home and luckily, they had the means to remodel their bathroom so that the shower could accommodate a roll-in wheelchair and they could afford to bring in live-in assistance.

They had lived their entire lives of 65 years of marriage in their 2,800-sf home and although I was a frequent visitor, it had not occurred to me to ask the hard questions: Are you able to pay for care services? Are there insurance policies in place? Where do you keep financial paperwork and who besides ourselves can access your accounts should the need arise? Do you have a DNR (Do Not Resuscitate)? Do you

have a Will or Trust and is it up to date? Are there any family members that you'd like to receive personal mementos?

Consequently, when they passed away, I spent hours and hours poring through file cabinets, drawers and closets, trying to find important paperwork, bank account information, insurance policies, etc., plus trying to determine what to do with their accumulation of a lifetime of memories.

Things to Think About

When is the 'right' time to talk about downsizing? Having lived through these experiences, my husband and I have decided the right time is now. We are in our 60's. It's hard to know when one (or ones' parents) will become incapacitated. My parents were lucky to live well into their 90s with no major health issues and with their mental capacity intact. My aunt and uncle both descended into dementia and Alzheimer's quickly and without warning. You just never know.

Discuss long-term health insurance. It's expensive, but not as expensive as paying upwards of \$6,000 per month for a decent facility. Is there someone in the family willing to take on the responsibility of caring for a parent? Are you able to pay for caregivers if necessary? Is it really important to live in the family home? Does it have stairs or features that would pose difficulties if mobility becomes impaired? Do the size of the home, yard or other characteristics require excessive maintenance? Are you near services such as grocery stores if you can no longer drive? We have a long, steep driveway which isn't an issue now, but would be problematic in years to come. Would it be better to move into a planned community that allows one to live independently, but has the advantage of adding more services as they become necessary?

We had a neighbor who had lived with his wife and children in their 3,500+ sf, multi-storied home. After his children left and his wife passed away, he became disabled and was living out his life on the main floor,

unable to ascend or descend stairs and isolated from the outside world. Had he'd been willing to move years earlier, maybe he could have been in a facility where attendants and/or neighbors would have seen to his comfort. Over the years, his home had fallen into disrepair and equity had been used for his medical care. His daughter was forced to foreclose when he passed away.

Where are the wills and trusts? Is there a DNR on file and do you have a copy or know where to locate it if the time comes? If you cannot produce a DNR and the hospital does not have one on file, paramedics and hospital personnel are required to initiate all measures to keep you alive, which someone might not want. Do you know their wishes? Who in the family wants what? Avoid hard feelings early by having these things in writing before they become an issue.

We learned that downsizing was less about getting rid of space and clutter and more about being

prepared for any eventuality. As our generations live longer and better lives into old age, I believe we tend to think we can put off these important questions until 'later.' Having dealt with the reality we faced, we learned that 'later' is now and hopefully, we'll be able to save our children from making difficult decisions for us when the time comes.

Find out more about Laura, get her free travel tips, and subscribe to her email travel newsletter online at www.TravelbyLaura.com/free-travel-tips.

About the Author

Laura Segura

For over 25 years, Laura was Director of the National Teen Leadership Program (NTLP), a program she founded in 1992 to inspire and motivate teens to positions of positive leadership. The program, now in its 28th year, has served over 20,000 teens and garnered several awards including the Excellence in Education Award from Senator Barbara Boxer and the California Medal of Merit from the California National Guard. Prior to NTLP, Laura worked for 12 years as a manager with American Express Destination Services Hawaii. She is currently happily planning wonderful vacations as an Independent Travel Specialist for Travel Concepts, Inc.



Next Steps

It is our hope that the reader has found the information in this book to be helpful, supportive, and inspiring. Our overarching goal was to be a resource for those 55+ who are going and/or about to be going through the transition process of downsizing and relocating to a new place called home. The authors of *The Secret Sauce of Downsizing* were vetted through a very competitive process so as to provide our readers with top experts in their field. Each author has also generously offered free gifts at their individual websites. By going to the websites, you will have a great opportunity to take an in-depth look at the programs, products, and services that each author provides.

Through our collective skills, experience, and expertise it is our sincere hope that we can help and empower others. Share this book or give a copy of *The Secret Sauce of Downsizing* as a gift to friends, family, and clients. We feel this book is also essential

for businesses, service organizations, and non-profit organizations who serve seniors. Special rates are available for bulk purchases. Order copies now at info@AllWaysLearning.org or go to www.AllWaysLearning.org/orderbooks.

Educate and Empower Others!

Share this Book

Retail \$16.95+ Tax and Shipping

Special Discounts for Quantities

5 - 15 Books	\$11.95 Each
16 - 30 Books	\$9.95 Each
30 - 1,000 Books	\$7.95 Each

Resources

Resources for Those 55+

By Marlena E. Uhrik, EdD

One of the quickest and most thorough ways to find out about local, state, and national resources is to use the internet. With a simple search of “Resources for Seniors” the following categories were discovered under the California Department of Aging (www.Aging.ca.gov). You can look for your state’s corresponding website to find local resources.:

- Important Information- Public Safety Tips (regarding assistance to those who are firestorm victims)
- Master Plan for Aging
- Individuals and Families---Program and Services, Find Services in My County, Helpful Tools and Tips, Information and Resources,

Find Licensed Services: Do I Qualify? Care Options, Data and Reports

- Statewide Highlights and State and County Information

California has a number of programs that offer financial assistance for seniors. Categories include:

- Health Care and Prescriptions
- State Property Taxes
- Home Utilities
- Food and Nutrition
- Supplemental Income
- In-home Care and more

Perhaps the most famous national resource for those 55+ is the American Association of Retired Persons (www.AARP.org) AARP is a United States-based interest group whose stated mission is "to empower people to choose how they live as they age."

According to the organization, it had more than 38 million members as of 2018. (Wikipedia)

AARP has a plethora of information in their AARP Bulletin and their AARP Magazine and should be considered a valuable resource for those who want to “choose how they live as they age.”

Check also with your local Congress or state representatives. Here in California, our local Assemblyman mailed out information that included a resource for Senior Services that can be easily obtained in more than 150 languages just by dialing 2-1-1. This number provides free, confidential 24-hour source for health and social services.

Resources for Those Caring for Elderly Parents

Contributed by Helen Justice, GCM

Our aging population is growing at such a rate that our systems will not be able to handle this influx.

When a disaster strikes our parents, adult children say “they never saw this coming.” Then, for whatever reason, when the parent(s) are at the hospital, the fear of what’s next, and how much will this cost them, can be overwhelming.

With our seniors living longer, there are two things that our aging population worries about:

1. Will I run out of money before I die?
2. Will I be a burden to my children?

The last three years of their lives are the most expensive. They tried to save, and they hope they have done everything necessary by pre-planning. Most the time they do pretty well. However, most seniors don’t plan, nor do they want to talk about it.

Many adult children are retiring from years of working, only to find themselves in a new career: CAREGIVING for their parents. It's a full-time job, and most are ill-prepared for the duties, and everything else that goes along with taking care of Mom or Dad.

Out of an estimated 10 million older Americans receiving care, about 7 million are in their own home, or the home of a family member or friend. The National Association for Home Care & Hospice reports that over 12 million individuals currently receive care from more than 33,000 providers (for causes including acute illness, long-term health conditions, permanent disability, or terminal illness).

Most older people prefer their home over the unfamiliar proposition of living in a care facility.

Family or friends attempt to accommodate the wishes of loved ones even though caregiving demands might warrant a different environment. Those needing care feel comfortable and secure in

familiar surroundings, and a home is usually the best setting for that support.

Often the decision to stay in the home is dictated by funds available.

It is much cheaper for a wife to care for her husband at home than to pay out \$3,000 to \$6,000 a month for care in a facility. Likewise, it's much less costly and more loving for a daughter to have her widowed mother move into the daughter's home, rather than to liquidate mom's assets and put her in a nursing home. Besides, personally taking care of our parents or spouses is an obligation most of us feel very strongly about.

Here are some additional questions, resources and tips to think about, provided by Geriatric Care Manager, Helen Justice with Advanced Wellness, GCM. **You can find out more from Helen and grab her Free Report: How to Care for Your Aging Parents, 7 Resources for Better Elder Care online at**

www.AdvancedWellnessGCM.com/caregiver-report/

What do I need to know about MediCal and Medicare, what is the difference?

- What if my parents are on state assistance or Social Security?
- What if my parents are Veterans?
- What if my parents' money is tied up in investments or real estate?
- What if my parents need more care - in-home care vs. assisted living, what's the best route?
- How do I make sure my parents' income or savings is enough to sustain them until they pass?
- Where do I start if I'm the one who has to be their caregiver?
- My parents have long-term care insurance, doesn't that cover everything they need?

- My parents won't talk to me about their care or long-term plans, what do I do?
- What paperwork or legal documents need to be in place as my parents get older?

According to some sources, 60% of us will need long term care (eldercare) sometime during our lives. It is important for all of us to prepare for the day when we will need to help loved ones with care, or we will need eldercare for ourselves.

Another source indicates about 40% of all seniors, 65 and older, will spend some time in a nursing home. The National Care Planning Council estimates that, at any given time, at least 22% of all seniors, age 65 and older, are receiving some form of eldercare support, at home or in a facility.

Some 44.4 million adult caregivers — or 21% of the U.S. Adult population — provide unpaid care to seniors or adults with disabilities, according to a 2004 study by the National Alliance for Caregiving in Bethesda, Md. On average, those caregivers

provide 21 hours of care a week, and the average length of time spent providing care is 4.3 years.

There is so much to learn, and you can't do it all on your own.

Unfortunately, when your family is in “crisis”, where you have someone who’s in the midst of having a health or medical emergency, you have to make slightly uneducated and rash decisions. It’s more advisable to plan ahead for such emergencies and possibilities so that the whole family is prepared “just in case”.

Also known as a Geriatric Care Manager, Elder Care Manager or Care Manager, a Geriatric Care Specialist represents a growing trend to help full-time, employed family caregivers provide care for loved ones living close by or needing long-distance care. Specialists are also particularly useful in helping at-home caregivers find the right services to cope with their burden.

Below is a partial list of what a Geriatric Care Specialist might do:

- Assess the level and type of care needed and develop a care plan
- Take steps to start the care plan and keep it functioning
- Make sure care is received in a safe and disability-friendly environment
- Resolve family conflicts and other family issues relating to long term care
- Become an advocate for the care recipient and the family caregiver
- Manage care for a loved one for out-of-town families
- Conduct ongoing assessments to monitor and implement changes in care
- Oversee and direct care provided at home
- Coordinate the efforts of key support systems

- Provide personal counseling
- Help with MediCal qualification and application
- Arrange for the services of legal and financial advisors
- Manage a conservatorship for a care recipient
- Assist with relocation in assisted living community or nursing home
- Monitor the care of a family member in a nursing home or in an assisted-living facility
- Assist with the monitoring of medications
- Find appropriate solutions to avoid a crisis
- Coordinate medical appointments and medical information
- Provide transportation to medical appointments
- Assist families in positive decision-making

- Develop long-range plans for older loved ones not currently needing care

As with hiring any paid care provider to come into the home, hiring a geriatric care specialist is a similar situation. For those who desire to remain in the home, the geriatric care specialist can help make that a reality, and keep the care recipient away from a premature admittance into a care facility.

But the Geriatric Care Specialist can also help in the other direction. Frequently, the family is attempting to keep a loved one at home, when that is not the best situation. For many and various reasons, care in the home may be impossible. In this case, finding a facility is best.

Learn more about Helen Justice, GCM, if you're in California, by going to her website at www.advancedwellnessgcm.com. Otherwise find a local Geriatric Care Specialist in your area to support you.