

# MOVING MOM & DAD

THE ADULT CHILD'S CHECKLIST FOR SUPPORTING A SENIOR REAL ESTATE TRANSITION

## INTRODUCTION

Are you helping your aging parent make a move—whether it's downsizing, relocating, or selling the family home?

It's emotional. It's complicated. And sometimes, it feels overwhelming.

This free checklist breaks the process into manageable, compassionate steps—so you can feel prepared, not panicked.

## STEP 1: START THE CONVERSATION

### What to Do:

- ☐ Gently bring up the topic of moving. Avoid pressure or urgency.
- ☐ Ask open-ended questions about their comfort, health, and future preferences.
- ☐ Acknowledge and validate their feelings around aging, independence, and leaving the family home.
- ☐ Listen for concerns about things like:
  - Managing stairs or home maintenance.
  - Loneliness or being far from family.
  - Feeling overwhelmed by clutter or possessions.
  - Affordability of staying in place.

### Helpful Questions:

- “How does the house feel these days?”
- “Do you still enjoy living here?”
- “Would it feel good to have less to take care of?”



*Tip: Practice patience. Often, this isn't one conversation—it's a series of gentle nudges over time.*

## STEP 2: ASSESS THE HOME

### What to Do:

- ☐ Walk through the home together and take note of:
  - Safety concerns (poor lighting, loose rugs, steep stairs, narrow doorways).
  - Areas of the home that go unused.
  - Difficult-to-maintain spaces (yard, basement, multiple bathrooms).
  - Needed repairs before listing the property.

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## ASSESS THE HOME *continued*

- ☐ Document anything that may become a barrier to aging in place.
- ☐ Consider bringing in an occupational therapist or aging-in-place specialist.



*Ask: "Does this home still support how you live now—and how you want to live in the years ahead?"*

## STEP 3: PLAN FOR DOWNSIZING

### What to Do:

- ☐ Break the task into zones (closets, bedrooms, garage).
- ☐ Start with non-sentimental areas—reduce overwhelm.
- ☐ Create piles: **Keep, Donate, Sell, Recycle, Unsure.**
- ☐ Involve siblings or grandkids in sorting sentimental or heirloom items.
- ☐ Consider professional support:
  - Senior Move Managers
  - Estate Clean-Out Services
  - Professional Organizers
- ☐ Make decisions easier by asking:
  - "Have you used this in the last year?"
  - "Would you buy it again today?"
- ☐ Research temporary storage if there's a gap between selling and moving.



*Tip: Frame it positively. This is about simplifying life, not letting go of identity.*

## STEP 4: UNDERSTAND FINANCIALS & LEGAL

### What to Do:

- ☐ Have a REALTOR® complete a Comparative Market Analysis (CMA).

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## UNDERSTAND FINANCIALS & LEGAL

*continued*

- ☐ Talk through housing options and associated costs:
  - Condominiums
  - Rentals or Life Leases
  - Retirement communities (independent vs. assisted living)
  - Co-living arrangements (like Golden Girls-style shared homes)
- ☐ Confirm:
  - Who holds title to the home?
  - Any outstanding mortgage, liens, or taxes?
  - Is there a current Will and Power of Attorney?
- ☐ Meet with a financial advisor or accountant to assess:
  - Budget for the next phase of living.
  - Impact on pensions, CPP/OAS, or benefits.
- ☐ Ask about government supports and tax credits (e.g., Home Accessibility Tax Credit).



*Note: Your Realtor® can refer you to elder-focused lawyers, notaries, and financial professionals.*

## STEP 5: CHOOSE THE RIGHT SUPPORT

### What to Do:

- ☐ Work with a REALTOR® who understands seniors' needs, accessibility, and the emotional weight of these moves.
- ☐ Gather a team:
  - Senior-friendly movers
  - Junk removal and donation services
  - Cleaners or handypeople for pre-sale prep
- ☐ Discuss "right-size" living—not just smaller, but smarter:
  - One-floor layouts
  - Walk-in showers
  - Close to transit and healthcare
- ☐ Build a timeline:
  - Plan buffer time for emotional decision-making.
  - Avoid rushing through big milestones like listing, offer acceptance, or move-out.



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*Remember: Support comes in many forms—physical, emotional, and professional.*

## STEP 6: HELP THEM SETTLE INTO THEIR NEW SPACE

### What to Do:

- ☐ Set up the bedroom and bathroom first—comfort and function come first.
- ☐ Decorate with familiar items (family photos, their favourite chair, artwork).
- ☐ Ensure immediate needs are ready:
  - Medications
  - Meal options
  - Phone/internet setup
- ☐ Help them explore the new area:
  - Where's the grocery store, post office, nearest park?
  - Are there any senior or community centres nearby?
- ☐ Encourage them to join activities, routines, or groups that match their interests.
- ☐ Visit regularly in the early weeks to ease the adjustment.



*Reframe the experience: This isn't about loss—it's about creating a safe, connected, manageable life going forward.*

HAVE QUESTIONS OR NEED SUPPORT  
WITH YOUR PARENTS' MOVE? I'M  
HERE TO HELP—LET'S TALK.