



Downsizing 101: Keep it Simple

Downsizing your belongings can be emotional and difficult. As the owner of your stuff, letting go of belongings might mean the realization of hobbies you will no longer have time to get to or letting go of the past. Going through stuff can involve reliving your life through a special coffee cup, a certain chair, a vase, or a family soup pot. Having the choice to decide where your belongings will end up is empowering.

When it's time to start, here's a checklist to keep it simple:

- First, discuss your plans with family members and friends. Have them tell you which items they would like. Don't assume they want something, ask them first. When you pass down possessions, attach the history of the item to it.
- "Who Gets Grandma's Yellow Pie Plate?" is a workbook from the University of Minnesota that has detailed lists to complete and questions to answer for both the older family members and for surviving heirs. It also gives different ways that families can divide non-titled property.
- For smaller or more valuable items, sell on eBay or at a consignment store. Look for Consignment or eBay on YellowPages.com.
- To let go of a large quantity of items at once, call an auctioneer to see how much money they will give you. Look for Auctioneers in YellowPages.com.
- Donate the remaining items to the Goodwill, shelters, thrift stores, Salvation Army, Hope Rescue Mission, etc. and get a tax receipt. Value items at thrift shop value; go to www.salvationarmyusa.org for a valuation guide or Turbo Tax will calculate fair market value of donated items.
- Recycle as much as you can. Don't throw it in the landfill if it can be recycled: metal, hazardous waste, tires, electronics, glass, cardboard, plastic, batteries, tv's, etc. For Berks County, Pennsylvania call 610-478-6362 or go to www.co.berks.pa.us/swa for the next clean-up dates in the county. For other counties, go to the blue pages in your phone book, the county's website or go to www.earth911.org to recycle just about anything.

Finally, downsizing can be an appropriate time to talk about sensitive information with family members that they may need to know.

- The location of the will and if it is current or needs an update. A copy should be with the executor.
- Any DNR (do not resuscitate) orders and other end-of-life directives should be clearly spelled out.
- Organ donor directives.
- Location of military discharge papers for a military burial.
- Location of insurance policies, bank accounts, and key to safe deposit box.
- Any hiding places for money and valuables.

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