



# THE ULTIMATE DOWNSIZING GUIDE FOR HOMEOWNERS

Jacquie Othen

647-383-7653

JACQUIE@OTHENGROUP.COM

OTHENGROUP.COM





# Downsizing your home can be both **Empowering and Emotional**

Whether you're moving to simplify life, reduce expenses, or embrace a fresh start, this guide is designed to help you navigate every step with clarity and confidence.

From planning and decluttering to adjusting to your new space, here's how to make your transition smooth, intentional, and rewarding.



“The magic of downsizing is that it increases the value of everything you keep.”

Marie Kondo

# 1. Clarify Your Needs and Goals

Before you make a move, take time to reflect on your motivations and future lifestyle.

## IDENTIFY YOUR WHY:

Are you looking to reduce upkeep, save money, or be closer to family? Clear goals will guide smarter decisions.

## RIGHT-SIZE YOUR SPACE:

Consider what you truly need. For your new home, is condo living right for you, or would a bungalow just be right?

## UNDERSTAND THE TRUE COSTS:

Downsizing doesn't always mean cheaper. Property taxes, insurance, and current mortgage rates can offset savings. Research carefully before committing.

## PLAN FOR PRIVACY:

Smaller homes can mean tighter quarters. If you're living with a partner or family member, ensure the layout provides enough separation.



## Professional Tip:

Before you do anything else, have a clear plan and assemble a team of trusted professionals who have your best interests at heart. Downsizing is not just a move, it's a major life transition, and the right team makes all the difference.

# 2.

## Declutter with Intentions

Letting go of belongings is tough—but liberating.

### START EARLY:

Begin months in advance. Tackle one room or item category at a time.

### APPLY THE 80/20 RULE:

Most people use just 20% of what they own regularly. Ask yourself what you truly use and love.

### SORT THOUGHTFULLY:

Use keep, donate, sell, and toss piles. Be honest—will it fit and serve you in the new home?

### DIGITIZE KEEPSAKES:

Scan photos and documents to save space and preserve memories.



### Professional Tip:

Try the **"90/90 Rule"**

If you haven't used it in the past 90 days and won't in the next 90, let it go.

# 3. Sell, Donate, or Gift Mindfully

Reduce what you own and give your items  
a new life elsewhere.

## SELL WHAT YOU CAN:

Use platforms like Facebook Marketplace, eBay, or consignment stores for valuable items. Remember, always safety first when meeting strangers.

## DONATE WITH PURPOSE:

Many non-profits offer pickup services for furniture and household goods.

## GIFT MEANINGFULLY:

Offer heirlooms or special items to family and friends who will appreciate them.

## EVALUATE STORAGE TRADE-OFFS:

If your new home has limited storage, be selective with what you keep.



## Professional Tip:

**Donate** your unwanted items to charities that provide official tax receipts. It's a win-win, you're giving back to your community while earning valuable tax benefits at the same time.

# 4. Measure and Plan Ahead

Avoid surprises on moving day by mapping out what will (and won't) fit.

## GET ACCURATE DIMENSIONS:

Obtain your new home's floor plan and measure your furniture. Ensure your next home will have easy access.

## TEST FURNITURE FIT:

Large furniture often doesn't scale well in smaller homes. Don't move items that won't work.

## ACCOUNT FOR STORAGE:

Smaller homes mean fewer closets and garage space. Consider storage furniture or built-ins.

## USE DIGITAL TOOLS:

Try layout apps to visualize furniture placement in advance.

## Professional Tip:

Take photos of your current rooms and compare them to your new home's layout to help envision what works.

# 5. Organize Your Important Documents

Make sure you know where everything important is - without the clutter.

## CONSOLIDATE KEY DOCUMENTS:

Passports, medical records, insurance, deeds—store them in one secure place.

## DIGITIZE THE REST:

Use secure cloud storage for files you don't need in physical form.

## SHRED WHAT'S OUTDATED:

Safely dispose of old paperwork to protect your privacy.



## Professional Tip:

Create a **"Life Binder"** with critical documents and instructions to help loved ones in an emergency.

# 6. Strategize Your Move

A smooth transition starts with thoughtful planning.

## HIRE EXPERIENCED MOVERS:

Especially helpful for seniors or long distance moves — some specialize in downsizing.

## LABEL EVERYTHING:

Mark boxes clearly by room and priority to make unpacking easier.

## AVOID MOVING IN PHASES:

If possible, avoid storing first and test living with less. Considering hiring a move manager or downsizing expert to help.



## Professional Tip:

Pack a **"First-day Box"** with toiletries, bedding, coffee supplies, and phone chargers—you'll thank yourself later.

# 7. Embrace the Emotional Journey

Letting go of a longtime home is emotional.

**GIVE YOURSELF GRACE.**

## **HONOR YOUR FEELINGS:**

Nostalgia is normal. Acknowledge the memories and milestones.

## **FOCUS ON THE GAINS:**

Less upkeep, more time, and freedom to explore a new lifestyle.

## **SEEK SUPPORT:**

Talk to loved ones or a counselor if the emotions become heavy.



## **Professional Tip:**

### **WRITE A LETTER TO YOUR FUTURE BUYERS ABOUT YOUR HOME.**

Reflect on your time there and everything you loved and enjoyed about your home and community, so your buyers can as well.

# 8. Maximize and Personalize Your New Space

Make your smaller home functional, comfortable, and uniquely yours.

## USE EVERY INCH:

Think vertically—add shelving, under-bed storage, or wall-mounted solutions.

## STICK TO YOUR PLAN:

Avoid the temptation to refill every nook. Less can truly be more and will allow you to personalize your new home.

## PERSONALIZE WITH PURPOSE:

Choose meaningful decor that brings joy without adding clutter.



## Professional Tip:

Invest in custom storage solutions to make your new space efficient and beautiful.

# 9. Adjust and Thrive in Your New Lifestyle

Settling in is just the beginning  
of your new chapter.

## **BUILD NEW HABITS:**

Regularly declutter, buy mindfully,  
and stay organized.

## **RESEARCH THE AREA:**

Ensure access to community  
events, healthcare, social clubs,  
and daily conveniences.

## **AVOID LONELINESS:**

If you're leaving a close-knit  
neighbourhood, join local meetups  
or classes to rebuild connection.

## **MIND THE OUTDOORS:**

If having a yard or garden is  
important to you, be sure the new  
home supports that desire.



## Professional Tip:

Schedule a **"3-Month Check-in"** to reflect on  
what's working and what needs adjusting.  
Allow yourself time to settle and adjust.

# 10.

## Stay Mindful Moving Forward

Downsizing is a mindset—keep it alive.

### ADOPT THE ONE-IN, ONE-OUT RULE:

For every new item, something else goes.

### REASSESS ANNUALLY:

Set a reminder to review your belongings and eliminate what's no longer serving you.

### CELEBRATE THE SIMPLICITY:

Less stuff means more freedom, more peace, and more room for what truly matters.



### Professional Tip:

Keep a journal to document how downsizing has enhanced your life. It's a great motivator and memory keeper.



## Final Thought

Downsizing isn't just about moving to a smaller home.

**IT'S ABOUT MOVING TOWARD A BIGGER LIFE.**

With intention, preparation, and a little courage, you can create a space and lifestyle that brings more ease, connection, and joy.



Thinking about moving or selling? You don't have to navigate the journey alone.

**We're here to guide you. Let's connect today!**

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