

# Downsizer's Club

*Welcome to the Downsizer's Club!*

As a valued member of Wesley's Priority Reservation List, you have exclusive access to Wesley's new Downsizer's Club! Full of special perks, this special monthly program is designed to help you prepare to move to a Wesley community.

On the second Tuesday of each month, Downsizer's Club members will hear from a variety of professionals on topics to help you take the next steps toward a future at Wesley with confidence and ease. Club members have access to expert guidance, actionable tips, and a supportive community of fellow Priority Reservation List members. Whether you're just starting to consider a move or are well on your way, this series is here to make the process easier and satisfying.

This is a safe place to work through the downsizing process! Let the experts and your peers be your support group.

One of the Downsizer's Club perks is this handy notebook to help keep track of your progress, note solutions that worked, and jot down your questions or challenges that you want to discuss with the club.

Remember, for your convenience, you can attend in person or online!

## How to Register ?

**For Zoom:** Register once, and you'll have access to all 12 Zoom events. Join us for any or all sessions. There's no need to register for each Zoom webinar individually.

**For In-Person:** Seating is limited, so please call to **RSVP for each event you plan to attend in person**. The phone number for in-person locations will be provided each month.



[WesleyChoice.org/Downsizers-Club](https://WesleyChoice.org/Downsizers-Club)

## Wesley Priority Reservation List Members

*Serving with*

*Heart,*

*Homes for*

*All Life's*

*Seasons!*

It is our sincere pleasure to partner with the Wesley Campuses to engage, educate and empower seniors for planning your customized senior transition. We want to provide direction for your early steps of preparation and ensure you have the confidence you need to say "Yes" when your Community Relations Director calls with a unit that meets your needs.

This monthly education series is exclusive to Wesley Priority Reservation List Members and will be both in person and on Zoom so that you do not miss any event. Please remember, if you plan to attend in person, we ask that you reach out to your Community Relations Director to reserve your seat(s). We hope to see you at the community where you have your reservation, AND you are welcome to attend in person the months it is being held at other campuses. No matter where it is held or how you attend, please know that the recordings will also be available for your future reference.

Throughout this year, you will meet a number of professionals with a variety of senior specialty expertise. As the facilitator for this Downsizer's Club, I look forward to being a resource. I want you to know that no matter how you choose to approach your transition to Wesley, this program will equip you with tools and talent to help you throughout the process.

In the end, we want you to feel fully equipped with a great team of experts. Your clarity and confidence is our goal.

*Kathryn Kleber*

Kathryn Kleber, Downsizer's Club Facilitator

Certified Senior Housing Professional

Managing Broker, Team RED Real Estate, Inc.

Team RED is pleased to provide our new book  
Downsizing Made Easy - 5 Easy Steps to a Successful Move  
as our gift to you!



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Each Keller Williams Office is Independently Owned and Operated

# The clock is ticking. Are you ready to move?

*"How do you eat an elephant? One bite at a time.  
How do you prepare to move? One step at a time."*



Goal Date to Move: \_\_\_\_\_

Residential Preference #1:

\_\_\_\_\_

Residential Preference #2:

\_\_\_\_\_

## Build Your Trusted Team

*If you need resources, ask your Wesley Community Relations team.*

**Goal Date:** \_\_\_\_\_ **Actual Date:** \_\_\_\_\_

Real Estate Agent: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Downsizing Company \_\_\_\_\_

Contact Info: \_\_\_\_\_

Moving Company: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Family Member: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Family Member: \_\_\_\_\_

Contact Info: \_\_\_\_\_

Family Member: \_\_\_\_\_

Contact Info: \_\_\_\_\_

## Financial Plan & Access to Home Equity

*Check into your home equity, stocks, 401ks, bridge loans, lines of credit, etc., to pay the funds needed to move.*



Financial Planner: \_\_\_\_\_

Contact: \_\_\_\_\_

Mortgage Loan Officer: \_\_\_\_\_

Contact: \_\_\_\_\_

Funds Needed for Entrance Deposit \$: \_\_\_\_\_

Due: \_\_\_\_\_

1st Month's Service Fee: \$ \_\_\_\_\_

Due: \_\_\_\_\_

Damage Deposit: \$ \_\_\_\_\_

Due: \_\_\_\_\_

Pet Deposit: \$ \_\_\_\_\_

Due: \_\_\_\_\_

*Now's the time to create a back-up plan in case the residence you want isn't available when you're ready to move. Consult your Wesley Community Relations team.*



**WesleyChoice.org**

## Declutter

*“Take only what you need,” says every senior that has moved into a retirement community.*

- **Paperwork**

- Put your files in a portable file box.
- Organize your taxes and other important paperwork.
- Put warranties and appliance instructions into a large envelope to leave for the family that will be moving in.

- **Identify what you want to move to your new apartment.**

- Use labels or colored dots.
- If you’ve already decided which room in your new home each item goes, go ahead and label those, too.
- Don’t be overwhelmed. Just start with one room at a time.

- **Anything that isn’t labeled is what you will be discarding.**

- Pick a different color dot for what you plan to give to family members. Be sure to talk about this with them beforehand so you aren’t saving something they don’t want.
- Last are the items that you will not take with you and aren’t meant for family and friends. These items can be marked to sell, donate or discard.

**Colored dots:**

\_\_\_\_\_ is for taking with you to Wesley

\_\_\_\_\_ is for family

\_\_\_\_\_ is for selling

\_\_\_\_\_ is for donation

\_\_\_\_\_ is for things for discard (repurpose, recycle or discard)

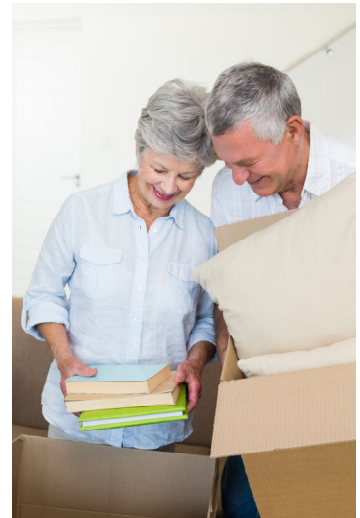


*Have you created your back-up plan in case the residence you want isn’t available when you’re ready to move? Consult your Wesley Community Relations team.*

## Now you are ready to say “YES!”

*You have accepted your new apartment and have 30 days to move. Now what?*

- ☐ What is your new address? \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_  
Zip \_\_\_\_\_
- ☐ Floor Plan \_\_\_\_\_
- ☐ Call your realtor.
- ☐ Schedule movers.
- ☐ Arrange finances for entrance deposits and payments due the first month.
- ☐ Ask Wesley community relations team for measurements and floor plans with grids.



With contribution from Kathryn Kleber,  
Senior Real Estate Specialist and Managing Broker  
**Team RED (206) 650-6113**

*We are always working to make sure seniors know where to find a great  
Senior Real Estate Specialist.*



**WesleyChoice.org**



Wesley is a nonprofit organization offering a full spectrum of lifestyle options for aging well, including residential communities and in-home care services in King and Pierce counties.

## Lifestyle Comparison Worksheet

	<b>Wesley Community</b>	<b>Your Home</b>
Monthly Rental Payment / Mortgage		
Dining Plan	Determined by	
Heat & Electricity	Included	
Water & Sewer	Included	
Trash Removal	Included	
Home / Renter's Insurance		
Telephone (local service)	Included	
Basic Cable TV	Included	
Basic Internet	Included	
Housekeeping	Included	
Transportation (scheduled Community events)	Included	
Vehicle Maintenance / Insurance		
Emergency Call System	Included	
Monitored Smoke Alarm System	Included	
Appliances (maintenance & repairs)	Included	
Interior Repairs	Included	
Exterior Repairs & Maintenance	Included	
Lawn Care & Groundskeeping	Included	
Events	Included	
Movie Nights & Entertainment (weekly)	Included	
Access to Campus Amenities	Included	
Fitness Center & Exercise Classes	Included	
24-hour Emergency Staffing	Included	
Home Care	15 minute minimum	4 hour minimum
On-site Access to Catered Living Services	Included	
On-site Access to Skilled Nursing & Rehab	Included	
Freedom from Home Maintenance & Upkeep	Included	
Peace of Mind for You & Your Family	Included	

## Notes



## Notes