

# Family Transition Toolkit

*Companion resources for Moving an Aging Parent*

by Anna Calderwick

**FAMILY TRANSITION GUIDES**

Version 1.0 — 2026

# About this Toolkit

This Toolkit is a companion to *Moving an Aging Parent*. The book is complete without it: every tool you need is printed in the book, and nothing here adds advice the book does not give.

What the Toolkit adds is room. There are extra copies of the pages families fill in most, longer versions of a few records, and a spreadsheet the whole family can share and keep up to date. Use only what helps; leave the rest.

Print any page as often as you need. Each sheet names the book tool or chapter it belongs to, and uses the same words: an owner is the person responsible for completing or following up an action, not the person who decides.

You may copy or print these pages for your own personal use and for use within your own household or family.

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## 8-Week Path: week-by-week schedule

### ■ RECORD

*Weeks count down to move day. Fill in an owner and a target date for each task; cross out anything that does not apply, and add your own tasks in the blank rows.*

*These are planning templates created for this guide, not industry standards or required schedules. A compressed timeline changes the plan. It does not, on its own, change who decides.*

| Week | Task                                                                                   | Book tool | Owner | Target date | Status |
|------|----------------------------------------------------------------------------------------|-----------|-------|-------------|--------|
| 8-7  | Complete the Transition Snapshot: the move, what is decided, what is open, fixed dates | T01       |       |             |        |
| 8-7  | Record what matters to your parent, in their words                                     | T02       |       |             |        |
| 8-7  | Record questions for professionals and who will ask them                               | T01       |       |             |        |
| 8-7  | Confirm the destination details before anything is booked                              | T03       |       |             |        |
| 8-7  | Agree a coordinator and a backup, and name an owner for each area of work              | T05       |       |             |        |
| 8-7  | Agree how and how often the family shares updates                                      | T05       |       |             |        |
| 8-7  | Choose the planning path with your parent                                              | T07       |       |             |        |
| 6-5  | Measure the route and the rooms                                                        | T04       |       |             |        |
| 6-5  | List the priority furniture and check fit with your parent                             | T04       |       |             |        |
| 6-5  | Set the fixed dates and milestones, working back from move day                         | T08       |       |             |        |
| 6-5  | Start sorting in smaller sessions, room by room                                        | T09       |       |             |        |
| 6-5  | Begin the Heirloom Decision Record for items that need more than a destination         | T10       |       |             |        |
| 6-5  | Ask movers for written estimates, described the same way to each                       | T11       |       |             |        |
| 4-3  | Compare estimates and book the mover                                                   | T11       |       |             |        |
| 4-3  | Set up the Move Cost Snapshot                                                          | T12       |       |             |        |
| 4-3  | Arrange sales, donations and pickups in an orderly way                                 | T09       |       |             |        |
| 4-3  | Agree who packs, with supplies and labels                                              | T08       |       |             |        |
| 4-3  | Start the change-of-address list                                                       | T14       |       |             |        |
| 4-3  | Work through items marked DECIDE LATER by their follow-up dates                        | T09       |       |             |        |
| 2-1  | Confirm access at both homes (elevator, loading, parking), if needed                   | T15       |       |             |        |
| 2-1  | Plan move day: your parent's day first, then the roles                                 | T16       |       |             |        |
| 2-1  | Agree the hand-carry items and who carries each                                        | T13       |       |             |        |
| 2-1  | Finish main packing; keep out what is needed in the last days                          | T15       |       |             |        |

| Week      | Task                                                           | Book tool | Owner | Target date | Status |
|-----------|----------------------------------------------------------------|-----------|-------|-------------|--------|
| 2-1       | Complete address changes, or record when each will be done     | T14       |       |             |        |
| Move week | Run the Move Week Countdown                                    | T15       |       |             |        |
| Move week | Run move day from the Move Day Command Sheet                   | T16       |       |             |        |
| Move week | Check the first night                                          | T17       |       |             |        |
| After     | Close the old home                                             | T18       |       |             |        |
| After     | First 30 Days Check-In at around 72 hours, one week and day 30 | T19       |       |             |        |
| After     | Carry anything still open on Decisions & Open Issues           | T06       |       |             |        |
|           |                                                                |           |       |             |        |
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## 4-Week Accelerated Path: week-by-week schedule

### ■ RECORD

*Weeks count down to move day. Fill in an owner and a target date for each task; cross out anything that does not apply, and add your own tasks in the blank rows.*

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| Week     | Task                                                                         | Book tool | Owner | Target date | Status |
|----------|------------------------------------------------------------------------------|-----------|-------|-------------|--------|
| 4        | Complete the Transition Snapshot and record what matters to your parent      | T01, T02  |       |             |        |
| 4        | Confirm the destination details in the first week                            | T03       |       |             |        |
| 4        | Measure the route and the rooms, and name owners at once                     | T04, T05  |       |             |        |
| 4        | Give each open decision an owner and a target date from the start            | T06       |       |             |        |
| 4        | Ask movers for written estimates                                             | T11       |       |             |        |
| 4        | Set the fixed dates and milestones                                           | T08       |       |             |        |
| 3        | Sort the items going to the new home first                                   | T09       |       |             |        |
| 3        | Decide the priority furniture with your parent                               | T04       |       |             |        |
| 3        | Book the mover as soon as the list is settled                                | T11       |       |             |        |
| 3        | Set up the Move Cost Snapshot                                                | T12       |       |             |        |
| 3        | Record significant items that need more than a destination                   | T10       |       |             |        |
| 2        | Continue sorting; give each DECIDE LATER item an owner, an action and a date | T09       |       |             |        |
| 2        | Start address changes                                                        | T14       |       |             |        |
| 2        | Arrange sales, donations and pickups that must happen before move day        | T09       |       |             |        |
| 2        | Agree who packs, with supplies and labels                                    | T08       |       |             |        |
| 1        | Run the Move Week Countdown and final packing                                | T15       |       |             |        |
| 1        | Plan move day: your parent's day first, then the roles                       | T16       |       |             |        |
| 1        | Agree the hand-carry items and who carries each                              | T13       |       |             |        |
| Move day | Run move day from the Move Day Command Sheet                                 | T16       |       |             |        |
| After    | Check the first night, then close the old home                               | T17, T18  |       |             |        |
| After    | Carry some sorting and sales forward on Decisions & Open Issues              | T06       |       |             |        |
| After    | First 30 Days Check-In                                                       | T19       |       |             |        |

Status: Not started · In progress · Blocked · Done

## 14-Day Urgent Path: week-by-week schedule

### ■ RECORD

Weeks count down to move day. Fill in an owner and a target date for each task; cross out anything that does not apply, and add your own tasks in the blank rows.

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| Week     | Task                                                                             | Book tool | Owner | Target date | Status |
|----------|----------------------------------------------------------------------------------|-----------|-------|-------------|--------|
| 2        | Record the core facts and fixed dates                                            | T01       |       |             |        |
| 2        | Record what matters to your parent, so speed does not override it                | T02       |       |             |        |
| 2        | Confirm the destination and the move-in arrangements first                       | T03       |       |             |        |
| 2        | Be clear about any authority questions (Chapter 1)                               | T01       |       |             |        |
| 2        | Agree a coordinator and owners                                                   | T05       |       |             |        |
| 2        | Secure the mover, the date and access at both ends                               | T11, T16  |       |             |        |
| 2        | Decide the priority furniture with your parent                                   | T04       |       |             |        |
| 2        | Sort only what is going; other items get a DECIDE LATER follow-up date           | T09       |       |             |        |
| 1        | Identify what your parent will need in the first days                            | T13, T17  |       |             |        |
| 1        | Protect documents, medications and valuables                                     | T13       |       |             |        |
| 1        | Update addresses with the organizations that matter first                        | T14       |       |             |        |
| 1        | Plan move day: your parent's day first, then the roles                           | T16       |       |             |        |
| 1        | Run the Move Week Countdown                                                      | T15       |       |             |        |
| Move day | Run move day from the Move Day Command Sheet                                     | T16       |       |             |        |
| After    | Check the first night                                                            | T17       |       |             |        |
| After    | Put everything carried forward on Decisions & Open Issues, with owners and dates | T06       |       |             |        |
| After    | Close the old home and complete the First 30 Days Check-In                       | T18, T19  |       |             |        |

Status: Not started · In progress · Blocked · Done

## Furniture fit tracker

### ◇ DECIDE

Measure in one unit throughout. Record actual measurements, not estimates.

Units: \_\_\_\_\_ Measured by: \_\_\_\_\_ Date: \_\_\_\_\_

#### Access route: key openings

| Point on the route       | Width | Height | Notes (turns, steps, depth of elevator) |
|--------------------------|-------|--------|-----------------------------------------|
| Building entrance        |       |        |                                         |
| Elevator door / interior |       |        |                                         |
| Hallway or turn          |       |        |                                         |
| Apartment or unit door   |       |        |                                         |
| Room door                |       |        |                                         |
| Other                    |       |        |                                         |

Smallest opening on the route: \_\_\_\_\_

#### Room measurements

| Room        | Wall lengths | Ceiling height | Doors, windows, outlets, fixed features |
|-------------|--------------|----------------|-----------------------------------------|
| Living area |              |                |                                         |
| Bedroom     |              |                |                                         |
| Other       |              |                |                                         |
| Other       |              |                |                                         |

## Furniture fit tracker: priority furniture

### ◆ DECIDE

List the pieces your parent most wants to bring, in their order of priority. For Fits?, write Yes, No or Tight.

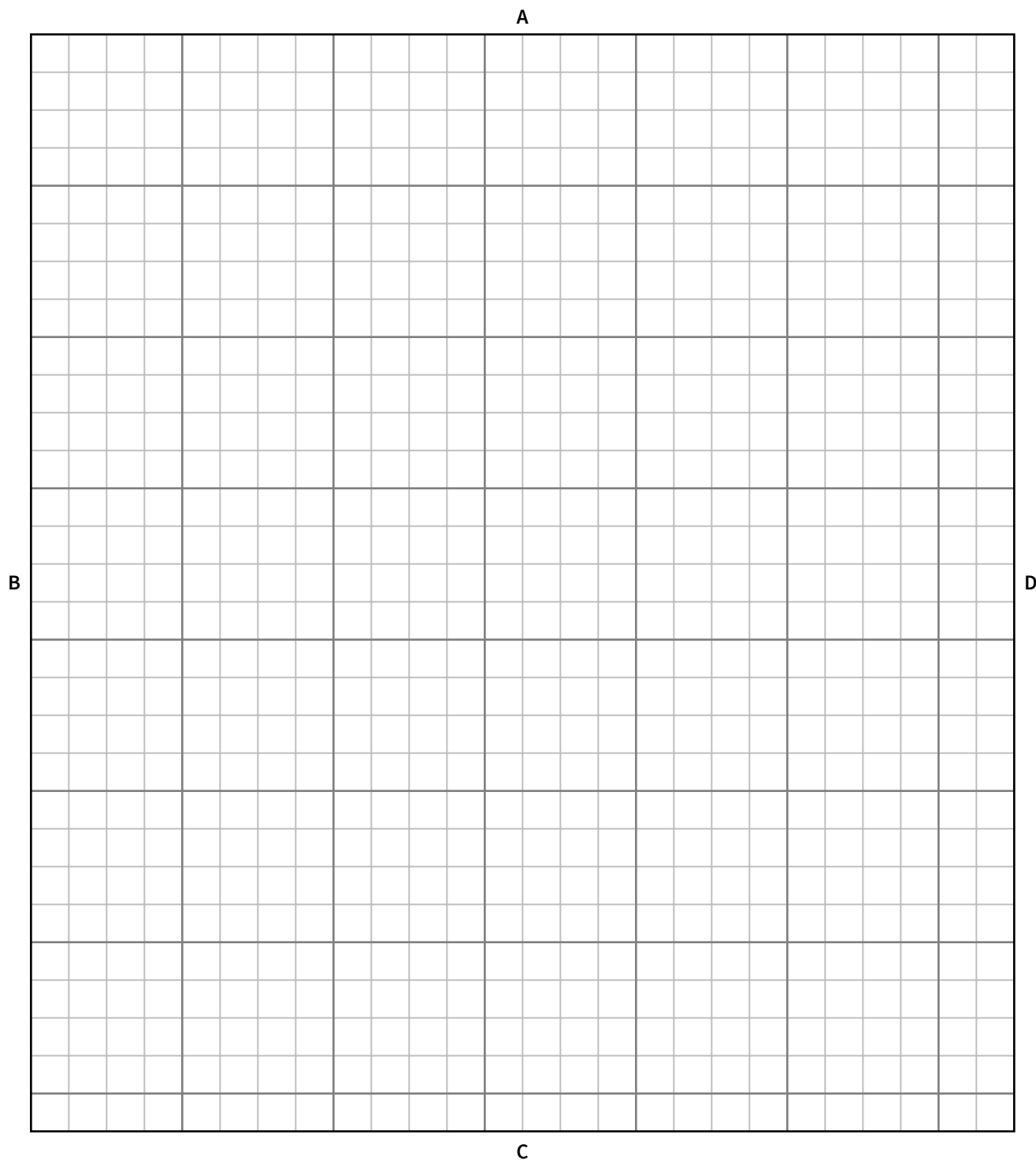
| Item | Size (W × D × H) | Intended room | Your parent's priority | Fits? | Decision |
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“Fits” means the item appears able to pass through the route and be placed, not that the room is safe, accessible or easy for your parent to move around in. Nor does it mean that the building allows the item or that it can be carried safely. If “Tight,” ask the mover to confirm; if “No,” note an alternative in the Decision column.

## Room layout grid

Room: \_\_\_\_\_ Scale: 1 square = \_\_\_\_\_

*Mark the walls, doors, windows and outlets first. Then sketch the priority furniture, and review the sketch with your parent.*

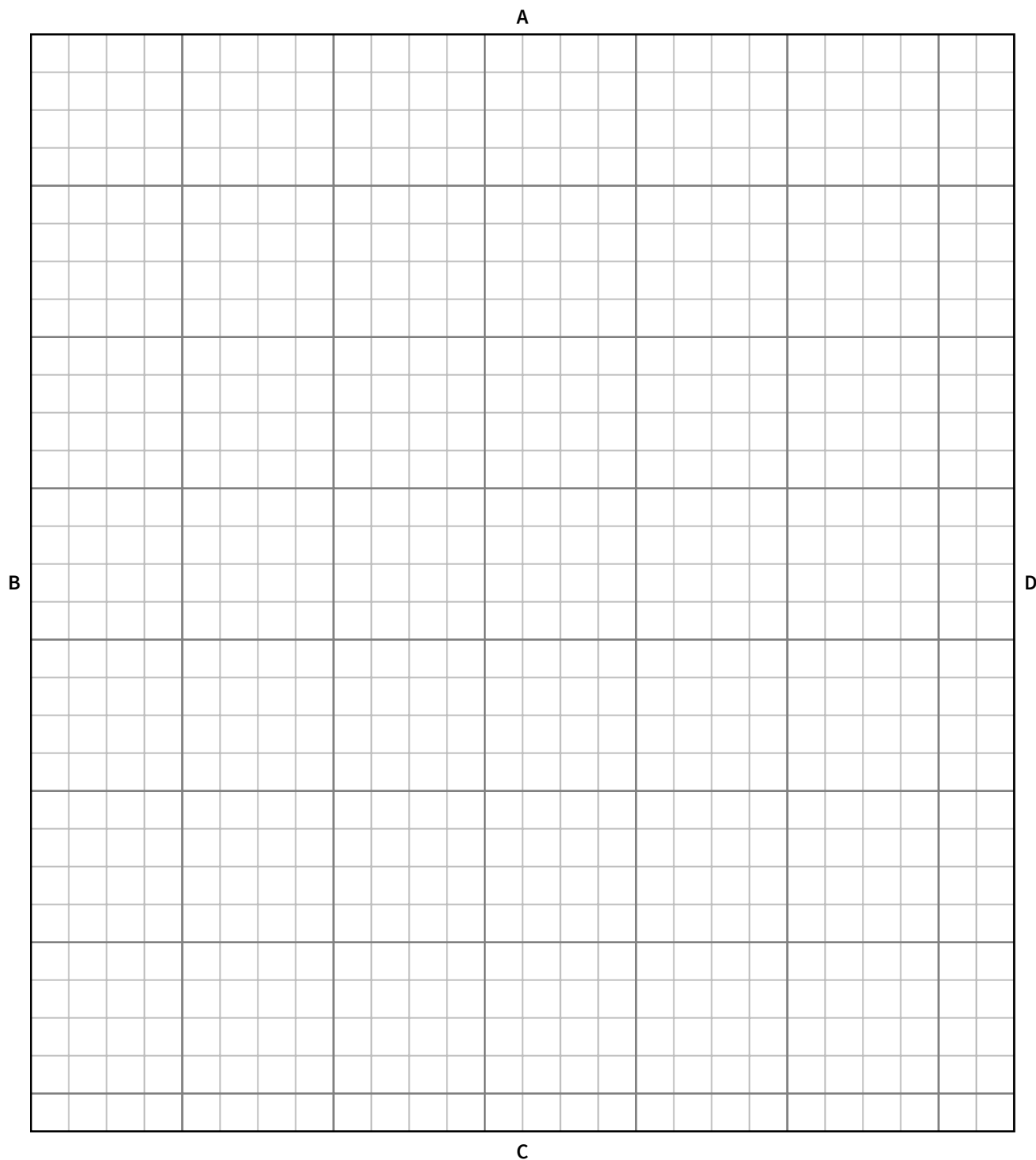


Scale reference: 4 squares = 1 in

## Room layout grid

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*Mark the walls, doors, windows and outlets first. Then sketch the priority furniture, and review the sketch with your parent.*

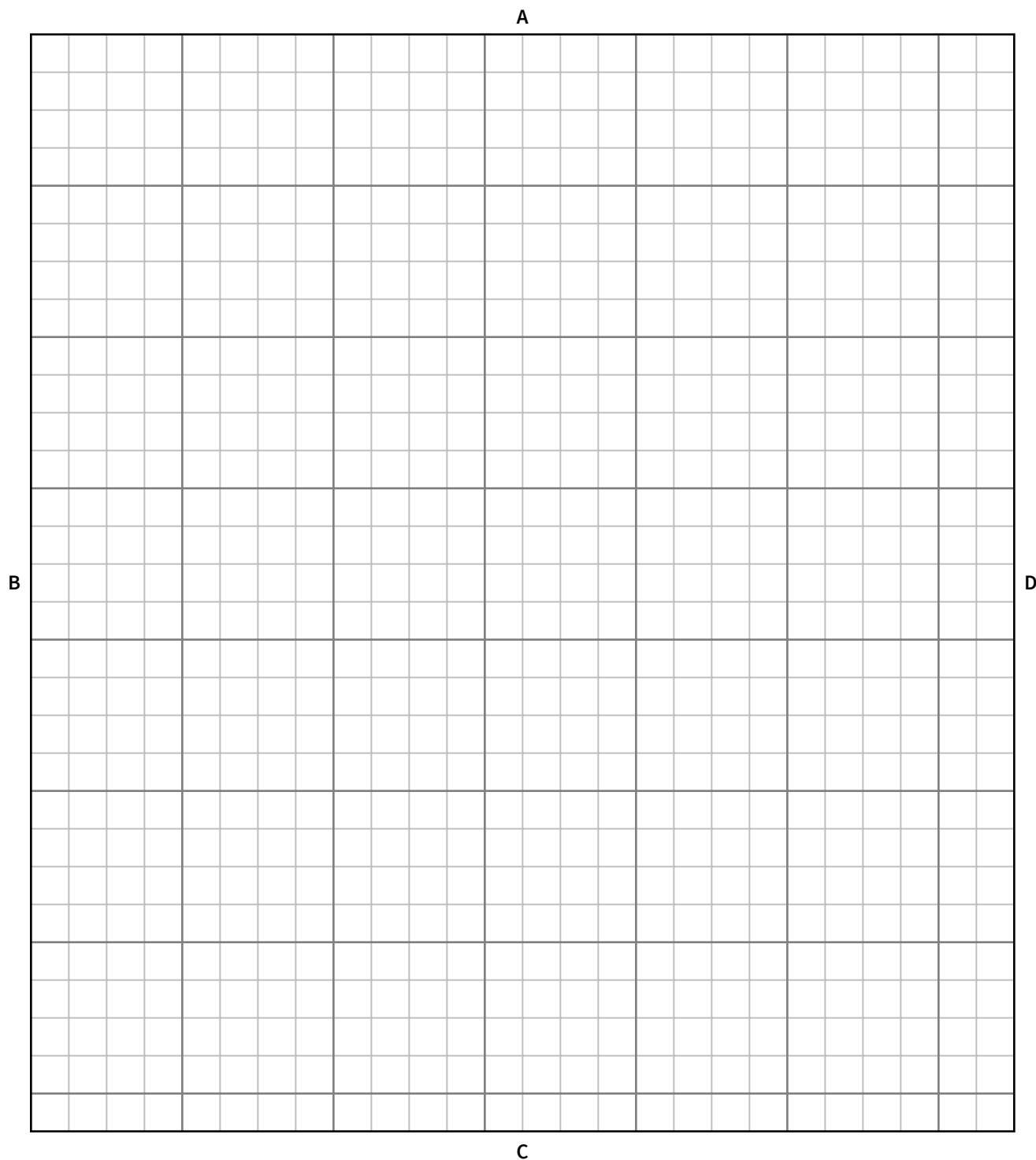


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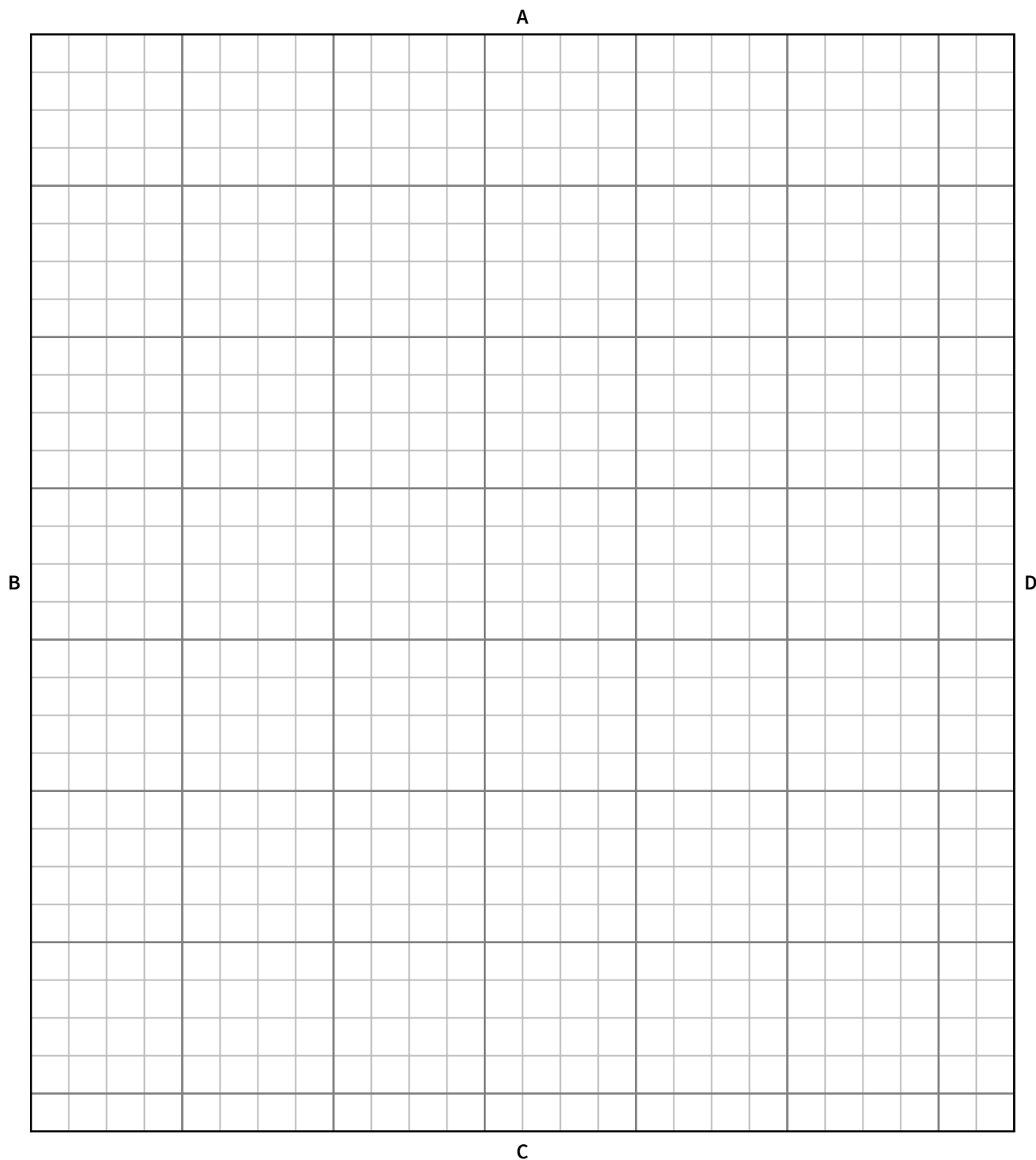


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## Room layout grid

Room: \_\_\_\_\_ Scale: 1 square = \_\_\_\_\_

*Mark the walls, doors, windows and outlets first. Then sketch the priority furniture, and review the sketch with your parent.*



Scale reference: 4 squares = 1 in

# Task board

● OWNER

Owner means the person responsible for completing or following up the action, not the decision-maker or the legal or property owner. Decisions themselves, and who makes them, stay on Decisions & Open Issues (T06).

| Task | Area of work | Owner | Next step | Target date | Depends on | Status |
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Status: Not started · In progress · Blocked · Done

## Task board

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| Task | Area of work | Owner | Next step | Target date | Depends on | Status |
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| Task | Area of work | Owner | Next step | Target date | Depends on | Status |
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# Decisions & Open Issues: additional pages

■ RECORD

Who decides is the person or body whose decision it is, often your parent. The owner follows through: owner means the person responsible for completing or following up the action, not the decision-maker or the legal or property owner.

| Decision or issue | Parent's view | Who decides | Owner and next step | Target date | Outcome or status |
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Status for open issues: Not started · In progress · Blocked · Done

# Decisions & Open Issues: additional pages

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| Decision or issue | Parent's view | Who decides | Owner and next step | Target date | Outcome or status |
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Status for open issues: Not started · In progress · Blocked · Done

## Contacts list

### ■ RECORD

*Family, the residence, professionals, movers and other services in one place. A question for a professional belongs on Who Does What (T05); its answer, if it leaves a decision, moves to Decisions & Open Issues (T06).*

| Person or organization | Role | Phone / email | Question or action with them | Family follow-up | Expected by | Status |
|------------------------|------|---------------|------------------------------|------------------|-------------|--------|
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*Do not record passwords, PINs, full account numbers or Social Security numbers on this page.*

## Contacts list

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Status: Not started · In progress · Blocked · Done

*Do not record passwords, PINs, full account numbers or Social Security numbers on this page.*

## Room sorting: destination key

### ◇ DECIDE

| Destination         | Meaning                                                                      |
|---------------------|------------------------------------------------------------------------------|
| <b>MOVE</b>         | Goes to the new home.                                                        |
| <b>FAMILY</b>       | Goes to a family member or someone your parent knows, as your parent wishes. |
| <b>SELL</b>         | To be sold.                                                                  |
| <b>DONATE</b>       | To be given to a charity or organization.                                    |
| <b>STORE</b>        | Kept in storage, with a reason and a date to review it.                      |
| <b>RELEASE</b>      | Recycled or disposed of.                                                     |
| <b>DECIDE LATER</b> | Not yet decided; needs an owner, an action and a date.                       |

*DECIDE LATER always needs an owner, the action that will settle it, and a follow-up date. For significant or contested items, write DECIDE LATER, with “Review in Chapter 6” as the action and a follow-up date. Do not release papers until they have been checked.*

*The fourteen sheets that follow are additional copies of the Room Sorting Worksheet, one for each room or area of the house (print more if you need them). Write one destination for each item or group.*

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

| Item / group | Destination | Owner / action | Follow-up date |
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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◆ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

| Item / group | Destination | Owner / action | Follow-up date |
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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

| Item / group | Destination | Owner / action | Follow-up date |
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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

| Item / group | Destination | Owner / action | Follow-up date |
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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

| Item / group | Destination | Owner / action | Follow-up date |
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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

| Item / group | Destination | Owner / action | Follow-up date |
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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◆ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Room sorting worksheet

### ◇ DECIDE

*One destination for each item or group. Your parent's choices lead.*

Room or area: \_\_\_\_\_ Date: \_\_\_\_\_ Sorted with: \_\_\_\_\_

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Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

## Master inventory

■ **RECORD**

*The whole house on one list, room by room, for families who want a full inventory. Significant or contested items go on the Heirloom Decision Record (T10).*

[illegible]

Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

Status: Not started · In progress · Blocked · Done

## Master inventory

## RECORD

*The whole house on one list, room by room, for families who want a full inventory. Significant or contested items go on the Heirloom Decision Record (T10).*

[illegible]

Destinations: MOVE · FAMILY · SELL · DONATE · STORE · RELEASE · DECIDE LATER

Status: Not started · In progress · Blocked · Done

## Heirloom record (fuller)

### ◆ DECIDE

Each record carries the seven fields of the Heirloom Decision Record (T10), plus where the item is kept in the meantime and when it was handed over, and to whom.

|   |                                                                                                              |                   |                                |
|---|--------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|
| 1 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

|   |                                                                                                              |                   |                                |
|---|--------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|
| 2 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

|   |                                                                                                              |                   |                                |
|---|--------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|
| 3 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

Status: Not started · In progress · Blocked · Done

Follow-up: who will do what, and by when. Handed over: date and to whom. This page records your parent's wishes and the family's decisions. A preference recorded here is not a will, a legal gift or a transfer of ownership. It does not establish who owns an item or who is entitled to it.

## Heirloom record (fuller)

### ◇ DECIDE

|   |                                                                                                              |                   |                                |
|---|--------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|
| 4 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

|   |                                                                                                              |                   |                                |
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| 5 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

|   |                                                                                                              |                   |                                |
|---|--------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|
| 6 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

Status: Not started · In progress · Blocked · Done

*Follow-up: who will do what, and by when. Handed over: date and to whom. This page records your parent's wishes and the family's decisions. A preference recorded here is not a will, a legal gift or a transfer of ownership. It does not establish who owns an item or who is entitled to it.*

## Heirloom record (fuller)

### ◇ DECIDE

|   |                                                                                                              |                   |                                |
|---|--------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|
| 7 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

|   |                                                                                                              |                   |                                |
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| 8 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

|   |                                                                                                              |                   |                                |
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| 9 | Item (and room, if from T09)                                                                                 | Parent's wish     | Family interest (who, and why) |
|   | Advice needed?<br><input type="checkbox"/> Legal <input type="checkbox"/> Value <input type="checkbox"/> Tax | Decision / status | Intended recipient             |
|   | Follow-up / handed over?                                                                                     |                   | Kept in the meantime (where)   |
|   | Handed over on (date)                                                                                        | Handed over to    |                                |

Status: Not started · In progress · Blocked · Done

*Follow-up: who will do what, and by when. Handed over: date and to whom. This page records your parent's wishes and the family's decisions. A preference recorded here is not a will, a legal gift or a transfer of ownership. It does not establish who owns an item or who is entitled to it.*

## Vendor comparison: movers

### ◇ DECIDE

Describe the move the same way to every mover. Copy each estimate's type and amount exactly as stated in writing. Compare the scope before the total.

| Compare                                                      | Mover 1 | Mover 2 | Mover 3 |
|--------------------------------------------------------------|---------|---------|---------|
| Name and contact                                             |         |         |         |
| Move type (interstate / within one state / outside the U.S.) |         |         |         |
| U.S. DOT number; FMCSA registration checked (interstate)     |         |         |         |
| Date of estimate                                             |         |         |         |
| Written estimate received                                    |         |         |         |
| Estimate type, as stated (binding / non-binding / other)     |         |         |         |
| Based on (actual / virtual inspection, interstate)           |         |         |         |
| Rights booklet received, as a copy or a link (interstate)    |         |         |         |
| Item list matches ours                                       |         |         |         |
| Services included (packing, unpacking, assembly, other)      |         |         |         |
| Access assumed (stairs, elevator, parking, long carry)       |         |         |         |
| Additional charges or conditions noted                       |         |         |         |
| Any FMCSA warning signs noticed (interstate)                 |         |         |         |
| Amount, as stated in writing                                 |         |         |         |
| Deposit and payment terms                                    |         |         |         |
| Questions still open                                         |         |         |         |

Decision: \_\_\_\_\_ Agreed with your parent: \_\_\_\_\_

Date: \_\_\_\_\_

*Moves within one state: FMCSA suggests checking with your state, county or local consumer affairs agency or state moving association. Moves outside the U.S.: check which rules apply where your parent is moving. Listing a vendor here is not a recommendation.*

# Vendor comparison: other services and bookings

◆ DECIDE

Packers, cleaners, removal and donation pickups, storage and any other paid help, compared on the same terms, with each booking recorded once it is made.

| Service (packing, cleaning, removal, storage, other) | Vendor and contact | Scope, as stated | Quote or estimate, as stated in writing | Date booked and confirmation | Decision |
|------------------------------------------------------|--------------------|------------------|-----------------------------------------|------------------------------|----------|
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Listing a vendor here is not a recommendation.

## Move budget

### ■ RECORD

The main costs of the move in one place. Fill in estimates as quotes arrive, and actual figures as bills are paid.

| Category                                         | Estimated | Actual | Difference | Arranged or paid by | Date paid | Receipt or reference |
|--------------------------------------------------|-----------|--------|------------|---------------------|-----------|----------------------|
| Mover                                            |           |        |            |                     |           |                      |
| Packing materials                                |           |        |            |                     |           |                      |
| Packing or other services                        |           |        |            |                     |           |                      |
| Additional labor                                 |           |        |            |                     |           |                      |
| Family travel                                    |           |        |            |                     |           |                      |
| Setting up the new home                          |           |        |            |                     |           |                      |
| Storage                                          |           |        |            |                     |           |                      |
| Closing the old home (cleaning, disposal, other) |           |        |            |                     |           |                      |
| Room for the unexpected                          |           |        |            |                     |           |                      |
|                                                  |           |        |            |                     |           |                      |
|                                                  |           |        |            |                     |           |                      |
|                                                  |           |        |            |                     |           |                      |
|                                                  |           |        |            |                     |           |                      |
| <b>Total</b>                                     |           |        |            |                     |           |                      |

### Deposits and refunds to recover

| What | Amount | Due back | Status |
|------|--------|----------|--------|
|      |        |          |        |
|      |        |          |        |
|      |        |          |        |
|      |        |          |        |
|      |        |          |        |

Status: Not started · In progress · Blocked · Done

Whose money is used, and on whose authority, are questions for your parent and, where needed, an appropriate professional (Chapter 1).

## Address-change tracker

### ■ RECORD

*U.S. examples. Outside the U.S., use the equivalent national and local agencies. A USPS change of address does not update the organizations below; each must still be told.*

New address: \_\_\_\_\_

Effective: \_\_\_\_\_

| Organization or category                                                       | Category | By whom | Updated                  | Date | Confirmation or note |
|--------------------------------------------------------------------------------|----------|---------|--------------------------|------|----------------------|
| USPS (official website or Post Office)                                         |          |         | <input type="checkbox"/> |      |                      |
| Social Security (also the Medicare address; railroad retirement: see next row) |          |         | <input type="checkbox"/> |      |                      |
| Railroad Retirement Board (annuitants only; also their Medicare address)       |          |         | <input type="checkbox"/> |      |                      |
| Medicare Advantage or drug plan (if any)                                       |          |         | <input type="checkbox"/> |      |                      |
| Medicaid or other benefits (agency that administers them)                      |          |         | <input type="checkbox"/> |      |                      |
| State and local government                                                     |          |         | <input type="checkbox"/> |      |                      |
| Banks and financial institutions                                               |          |         | <input type="checkbox"/> |      |                      |
| Insurance                                                                      |          |         | <input type="checkbox"/> |      |                      |
| Health providers and pharmacy                                                  |          |         | <input type="checkbox"/> |      |                      |
| Utilities (old home and new)                                                   |          |         | <input type="checkbox"/> |      |                      |
| Subscriptions and memberships                                                  |          |         | <input type="checkbox"/> |      |                      |
| Friends, family and personal contacts                                          |          |         | <input type="checkbox"/> |      |                      |
|                                                                                |          |         | <input type="checkbox"/> |      |                      |
|                                                                                |          |         | <input type="checkbox"/> |      |                      |

*If you make a change on your parent's behalf, some organizations will need to see authority that they recognize (Chapter 1).*

## Address-change tracker: more organizations

## RECORD

*Every other organization, person or service that needs the new address.*

[illegible]

## Document locator

### ■ RECORD

Where each important document is kept, so it can be found and, if needed, kept within reach during the move. Locations only.

| Document or record                             | Where it is kept | Who holds it or can reach it | Copy needed? For whom | Moving with your parent? | Notes |
|------------------------------------------------|------------------|------------------------------|-----------------------|--------------------------|-------|
| Identification                                 |                  |                              |                       | <input type="checkbox"/> |       |
| Insurance and health information               |                  |                              |                       | <input type="checkbox"/> |       |
| Residence agreement, lease or other key papers |                  |                              |                       | <input type="checkbox"/> |       |
| Authority documents (Chapter 1)                |                  |                              |                       | <input type="checkbox"/> |       |
| Financial and benefit papers                   |                  |                              |                       | <input type="checkbox"/> |       |
| Property and home papers                       |                  |                              |                       | <input type="checkbox"/> |       |
| Mover and destination papers                   |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |
|                                                |                  |                              |                       | <input type="checkbox"/> |       |

Do not record passwords, PINs, full account numbers or Social Security numbers on this page. Knowing where a document is kept does not, by itself, give anyone authority to use it (Chapter 1).

## Essential items: expanded list

### ☒ CHECK

*The Hand-Carry Checklist (T13) as printed in the book, with room to record who carries each item and whether it arrived.*

| Item                                              | Packed                   | Carried by | Arrived                  |
|---------------------------------------------------|--------------------------|------------|--------------------------|
| Medications needed during the move and first days | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Medication list                                   | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Identification                                    | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Insurance and health information                  | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Residence agreement, lease or other key papers    | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Mover and destination contacts; access details    | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Phone and charger                                 | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Glasses; hearing-aid items                        | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Toiletries and a change of clothes                | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Keys                                              | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Cane, walker or other aids and equipment          | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Small valuables                                   | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Anything else needed before the truck is unloaded | <input type="checkbox"/> |            | <input type="checkbox"/> |

*Medications travel as your parent's clinician or pharmacist has advised; ask them about anything that needs special storage. Do not write passwords, PINs, full account numbers or Social Security numbers on this page.*

*Optional practical extras for the first days follow on the next page.*

## Essential items: practical extras

☒ CHECK

*Optional household extras that families often want close at hand for the first days. Add your own in the blank rows.*

| Item                                                     | Packed                   | Carried by | Arrived                  |
|----------------------------------------------------------|--------------------------|------------|--------------------------|
| Clothes for several days, including night clothes        | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Bedding and a pillow for the first night                 | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Towels and toilet paper                                  | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Familiar items your parent wants close by                | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Important contacts, written down                         | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Water and simple food for the day                        | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Basic tools (screwdriver, tape, scissors) and box cutter | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Light bulbs, extension cord and a flashlight             | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Cleaning basics for arrival                              | <input type="checkbox"/> |            | <input type="checkbox"/> |
| Pen, labels and this list                                | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |
|                                                          | <input type="checkbox"/> |            | <input type="checkbox"/> |

## Move Week Countdown

### ☒ CHECK

Check against the Master Move Plan (T08). Timing depends on your move; “by this stage” is a guide, not a rule. Anything not done goes on Decisions & Open Issues (T06) with an owner, a next action and a date.

#### About a week before

Owner / date

- |                                                                                             |       |
|---------------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Mover date, arrival window and services confirmed                  | _____ |
| <input type="checkbox"/> Access booked at both ends (elevator, loading, parking), if needed | _____ |
| <input type="checkbox"/> Reset done against T08, T06 and T05                                | _____ |
| <input type="checkbox"/> Priority packing under way, room by room                           | _____ |
| <input type="checkbox"/> Move-day roles agreed                                              | _____ |

#### By a few days before

Owner / date

- |                                                                                   |       |
|-----------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Main packing finished, or a clear plan for what remains  | _____ |
| <input type="checkbox"/> Hand-carry items (T13) kept apart from the packing       | _____ |
| <input type="checkbox"/> Not-for-movers items in a marked place                   | _____ |
| <input type="checkbox"/> Anything that would block the movers removed or arranged | _____ |
| <input type="checkbox"/> Your parent's travel and companion confirmed             | _____ |
| <input type="checkbox"/> Keys for both homes accounted for                        | _____ |
| <input type="checkbox"/> Destination ready to receive the move                    | _____ |

#### The day before

Owner / date

- |                                                                                        |       |
|----------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Mover and destination confirmed again                         | _____ |
| <input type="checkbox"/> Phones charged                                                | _____ |
| <input type="checkbox"/> Hand-carry items placed where they will travel                | _____ |
| <input type="checkbox"/> Your parent's essentials kept out for the evening and morning | _____ |
| <input type="checkbox"/> Move Day Command Sheet (T16) shared with everyone involved    | _____ |

#### Move morning

Owner / date

- |                                                                                        |       |
|----------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Your parent's essentials stay with them                       | _____ |
| <input type="checkbox"/> Roles active; one person speaking for the family at each home | _____ |
| <input type="checkbox"/> Walk-through with the crew lead                               | _____ |
| <input type="checkbox"/> Final walk-through of the old home before leaving             | _____ |

## Move Week Countdown

### ☒ CHECK

Check against the Master Move Plan (T08). Timing depends on your move; “by this stage” is a guide, not a rule. Anything not done goes on Decisions & Open Issues (T06) with an owner, a next action and a date.

#### About a week before

Owner / date

- |                                                                                             |       |
|---------------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Mover date, arrival window and services confirmed                  | _____ |
| <input type="checkbox"/> Access booked at both ends (elevator, loading, parking), if needed | _____ |
| <input type="checkbox"/> Reset done against T08, T06 and T05                                | _____ |
| <input type="checkbox"/> Priority packing under way, room by room                           | _____ |
| <input type="checkbox"/> Move-day roles agreed                                              | _____ |

#### By a few days before

Owner / date

- |                                                                                   |       |
|-----------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Main packing finished, or a clear plan for what remains  | _____ |
| <input type="checkbox"/> Hand-carry items (T13) kept apart from the packing       | _____ |
| <input type="checkbox"/> Not-for-movers items in a marked place                   | _____ |
| <input type="checkbox"/> Anything that would block the movers removed or arranged | _____ |
| <input type="checkbox"/> Your parent's travel and companion confirmed             | _____ |
| <input type="checkbox"/> Keys for both homes accounted for                        | _____ |
| <input type="checkbox"/> Destination ready to receive the move                    | _____ |

#### The day before

Owner / date

- |                                                                                        |       |
|----------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Mover and destination confirmed again                         | _____ |
| <input type="checkbox"/> Phones charged                                                | _____ |
| <input type="checkbox"/> Hand-carry items placed where they will travel                | _____ |
| <input type="checkbox"/> Your parent's essentials kept out for the evening and morning | _____ |
| <input type="checkbox"/> Move Day Command Sheet (T16) shared with everyone involved    | _____ |

#### Move morning

Owner / date

- |                                                                                        |       |
|----------------------------------------------------------------------------------------|-------|
| <input type="checkbox"/> Your parent's essentials stay with them                       | _____ |
| <input type="checkbox"/> Roles active; one person speaking for the family at each home | _____ |
| <input type="checkbox"/> Walk-through with the crew lead                               | _____ |
| <input type="checkbox"/> Final walk-through of the old home before leaving             | _____ |

# Move-day schedule

● OWNER

The day hour by hour, at both homes. Plan your parent’s day first, on the next page, and build this one around it.

Date: \_\_\_\_\_ Old address: \_\_\_\_\_

New address: \_\_\_\_\_

| Time | What happens | Where (old home / on the way / new home) | Who is responsible | Contact | Done                     |
|------|--------------|------------------------------------------|--------------------|---------|--------------------------|
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |
|      |              |                                          |                    |         | <input type="checkbox"/> |

# Move-day schedule: your parent’s day

● OWNER

Where your parent will be at each point in the day, who is with them, and what they need to have with them.

| Time | Where your parent is | Who is with them | What they need with them | Done                     |
|------|----------------------|------------------|--------------------------|--------------------------|
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |
|      |                      |                  |                          | <input type="checkbox"/> |

Where your parent will be in between: \_\_\_\_\_

## Room-by-room move sheet

### ■ RECORD

*One sheet for each room at the new home: what is labeled for it, where each thing goes, and whether it arrived.*

Room at the new home: \_\_\_\_\_ Label used: \_\_\_\_\_

| Label on the box or item | What it is | Where it goes in the room | Arrived                  | Unpacked                 |
|--------------------------|------------|---------------------------|--------------------------|--------------------------|
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |

## Room-by-room move sheet

### ■ RECORD

*One sheet for each room at the new home: what is labeled for it, where each thing goes, and whether it arrived.*

Room at the new home: \_\_\_\_\_ Label used: \_\_\_\_\_

| Label on the box or item | What it is | Where it goes in the room | Arrived                  | Unpacked                 |
|--------------------------|------------|---------------------------|--------------------------|--------------------------|
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |

## Room-by-room move sheet

### ■ RECORD

*One sheet for each room at the new home: what is labeled for it, where each thing goes, and whether it arrived.*

Room at the new home: \_\_\_\_\_ Label used: \_\_\_\_\_

| Label on the box or item | What it is | Where it goes in the room | Arrived                  | Unpacked                 |
|--------------------------|------------|---------------------------|--------------------------|--------------------------|
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |

## Room-by-room move sheet

### ■ RECORD

*One sheet for each room at the new home: what is labeled for it, where each thing goes, and whether it arrived.*

Room at the new home: \_\_\_\_\_ Label used: \_\_\_\_\_

| Label on the box or item | What it is | Where it goes in the room | Arrived                  | Unpacked                 |
|--------------------------|------------|---------------------------|--------------------------|--------------------------|
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |
|                          |            |                           | <input type="checkbox"/> | <input type="checkbox"/> |

## Mover inventory tracker

## RECORD

*For following the mover's inventory through loading and delivery. Copy the inventory or tag numbers as the mover writes them.*

[illegible]

☐ For U.S. interstate moves: inventory checked before signing, and a copy kept

☐ For U.S. interstate moves: damaged or missing items noted on the inventory before signing any documents at delivery

## Mover inventory tracker

## RECORD

*For following the mover's inventory through loading and delivery. Copy the inventory or tag numbers as the mover writes them.*

[illegible]

☐ For U.S. interstate moves: inventory checked before signing, and a copy kept

☐ For U.S. interstate moves: damaged or missing items noted on the inventory before signing any documents at delivery

# Room planning sheet: new home

■ RECORD

Sketch the room, then list what goes in it and what is still needed.

Room: \_\_\_\_\_

A

B

C

D

—————| Scale reference: 4 squares = 1 in

| What goes in this room | Where it goes | Still needed | Who | Done                     |
|------------------------|---------------|--------------|-----|--------------------------|
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |

# Room planning sheet: new home

■ RECORD

Sketch the room, then list what goes in it and what is still needed.

Room: \_\_\_\_\_

A

B

C

D

Scale reference: 4 squares = 1 in

| What goes in this room | Where it goes | Still needed | Who | Done                     |
|------------------------|---------------|--------------|-----|--------------------------|
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |

# Room planning sheet: new home

■ RECORD

Sketch the room, then list what goes in it and what is still needed.

Room: \_\_\_\_\_

A

B

C

D

\_\_\_\_\_ Scale reference: 4 squares = 1 in

| What goes in this room | Where it goes | Still needed | Who | Done                     |
|------------------------|---------------|--------------|-----|--------------------------|
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |
|                        |               |              |     | <input type="checkbox"/> |

## First-days setup sheet

### ● OWNER

*What still needs doing in the first days after the first night, who is doing it and by when. Anything that cannot be done goes on Decisions & Open Issues (T06).*

| Area                         | Setup task | Who | By when | Status |
|------------------------------|------------|-----|---------|--------|
| Sleeping                     |            |     |         |        |
| Sleeping                     |            |     |         |        |
| Bathroom                     |            |     |         |        |
| Bathroom                     |            |     |         |        |
| Daily use                    |            |     |         |        |
| Daily use                    |            |     |         |        |
| Doors, contacts and controls |            |     |         |        |
| Doors, contacts and controls |            |     |         |        |
|                              |            |     |         |        |
|                              |            |     |         |        |
|                              |            |     |         |        |
|                              |            |     |         |        |
|                              |            |     |         |        |
|                              |            |     |         |        |
|                              |            |     |         |        |

Status: Not started · In progress · Blocked · Done

## First-Night & Destination-Ready Checklist

### ☒ CHECK

*Can your parent use the new home tonight? Anything that cannot be done tonight goes on Decisions & Open Issues (T06) with an owner and a date.*

#### Sleeping

Owner / date

- ☐ Bed assembled, made up and where it was planned \_\_\_\_\_
- ☐ Light reachable from the bed \_\_\_\_\_
- ☐ Phone charged, and the charger within reach of the bed \_\_\_\_\_
- ☐ Glasses, hearing-aid items and other immediate personal items where your parent expects them \_\_\_\_\_
- ☐ Clothes for tomorrow morning easy to find \_\_\_\_\_

#### Bathroom

Owner / date

- ☐ Clear way to the bathroom from the bed and the chair \_\_\_\_\_
- ☐ Towels, toiletries and toilet paper out \_\_\_\_\_
- ☐ Light easy to find at night \_\_\_\_\_

#### Daily use

Owner / date

- ☐ Medications accessible, kept as your parent's pharmacist or clinician has advised \_\_\_\_\_
- ☐ Water or a drink within reach \_\_\_\_\_
- ☐ Evening meal and breakfast arranged, or residence meal times known \_\_\_\_\_
- ☐ One comfortable place to sit, with a light \_\_\_\_\_

#### Doors, contacts and controls

Owner / date

- ☐ Keys, or the way the door opens, understood \_\_\_\_\_
- ☐ Building or residence entry known and working for your parent \_\_\_\_\_
- ☐ Important contacts written down near the phone or bed \_\_\_\_\_
- ☐ Anything else your parent needs to operate tonight shown and working \_\_\_\_\_

#### Ask your parent

Owner / date

- ☐ Is there anything you want moved before tonight? \_\_\_\_\_
- ☐ Is there anything you cannot find? \_\_\_\_\_
- ☐ What would make tomorrow morning easier? \_\_\_\_\_

## Cleaning tracker

### ● OWNER

What “clean” means comes from whoever expects the property. Record the tasks agreed with them, who does each, and who checks it.

| Room or area        | Cleaning task | Who | Date | Checked by | Status |
|---------------------|---------------|-----|------|------------|--------|
| Entry and hallways  |               |     |      |            |        |
| Living room         |               |     |      |            |        |
| Dining area         |               |     |      |            |        |
| Kitchen             |               |     |      |            |        |
| Main bedroom        |               |     |      |            |        |
| Second bedroom      |               |     |      |            |        |
| Bathroom(s)         |               |     |      |            |        |
| Office or study     |               |     |      |            |        |
| Closets and storage |               |     |      |            |        |
| Laundry             |               |     |      |            |        |
| Garage              |               |     |      |            |        |
| Basement            |               |     |      |            |        |
| Attic               |               |     |      |            |        |
| Outdoor and sheds   |               |     |      |            |        |
|                     |               |     |      |            |        |
|                     |               |     |      |            |        |
|                     |               |     |      |            |        |
|                     |               |     |      |            |        |

Status: Not started · In progress · Blocked · Done

# Collection schedule

● OWNER

Every pickup, sale collection, donation and removal from the old home, with a date and someone there to meet it.

| What is collected | Collected by (organization, buyer, family) | Date and time window | Who is there | Receipt or confirmation | Done                     |
|-------------------|--------------------------------------------|----------------------|--------------|-------------------------|--------------------------|
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |
|                   |                                            |                      |              |                         | <input type="checkbox"/> |

## Handover record

### ■ RECORD

*A record of what was handed over at the old home, to whom and when. What is expected at handover comes from the lease, the sale arrangement, the residence or whoever expects the property.*

Handover date: \_\_\_\_\_ To (person or organization): \_\_\_\_\_

### Keys, fobs, cards and remotes

| Key, fob, card or remote | Current holder | Handed to | Date | Confirmed                |
|--------------------------|----------------|-----------|------|--------------------------|
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |
|                          |                |           |      | <input type="checkbox"/> |

### Handover

☐ Handed over on the date above, to the person or organization above

☐ Confirmation received, if one is expected

Confirmation or reference: \_\_\_\_\_

Notes: \_\_\_\_\_

## Old home closure checklist: expanded

☒ **CHECK**

*Room by room first, then the whole-house checks on the next page.*

| Room or area        | Empty or as agreed       | Cleaned                  | Checked by | Notes |
|---------------------|--------------------------|--------------------------|------------|-------|
| Entry and hallways  | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Living room         | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Dining area         | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Kitchen             | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Main bedroom        | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Second bedroom      | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Bathroom(s)         | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Office or study     | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Closets and storage | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Laundry             | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Garage              | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Basement            | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Attic               | <input type="checkbox"/> | <input type="checkbox"/> |            |       |
| Outdoor and sheds   | <input type="checkbox"/> | <input type="checkbox"/> |            |       |

## Old home closure checklist: whole house

### ☒ CHECK

*Is the old home ready to leave or hand over? What “finished” means comes from the lease, the sale arrangement, the residence or whoever expects the property. Anything not done goes on Decisions & Open Issues (T06) with an owner and a date.*

Handover date: \_\_\_\_\_ To (person or organization): \_\_\_\_\_

#### Remaining belongings

Owner / date

- ☐ Every room, closet and storage area checked \_\_\_\_\_
- ☐ Anything remaining is there on purpose (agreed to stay, scheduled, being removed or transferred, or on T06) \_\_\_\_\_
- ☐ Pickups and collections have an owner and a date \_\_\_\_\_
- ☐ Trash, recycling and items needing special disposal dealt with through the appropriate local service \_\_\_\_\_

#### Property condition

Owner / date

- ☐ Expected condition known, from whoever expects it \_\_\_\_\_
- ☐ Cleaning done, and checked by someone \_\_\_\_\_
- ☐ Items agreed to stay are in place \_\_\_\_\_

#### Services

Owner / date

- ☐ Each service stopped, transferred or kept on, as arranged with the provider \_\_\_\_\_
- ☐ Provider equipment returned where required \_\_\_\_\_
- ☐ Final bills and confirmations noted \_\_\_\_\_

#### Access

Owner / date

- ☐ All keys, including spares held by others \_\_\_\_\_
- ☐ Fobs, cards and remotes \_\_\_\_\_
- ☐ Mailbox and storage access \_\_\_\_\_

#### Handover

Owner / date

- ☐ Handed over on the date above, to the person or organization above \_\_\_\_\_
- ☐ Confirmation received, if one is expected \_\_\_\_\_

#### Still open

Owner / date

- ☐ Deposits and refunds expected are on the Move Cost Snapshot (T12) \_\_\_\_\_
- ☐ Address changes still outstanding are on the Change-of-Address Checklist (T14) \_\_\_\_\_
- ☐ Anything unresolved is on T06, with an owner and a date \_\_\_\_\_

## The digital workbook

The Toolkit also comes as a spreadsheet (*FTG01\_Family\_Transition\_Toolkit.xlsx*) that the whole family can share and update. It holds the same records as these pages, with the same fields and the same status words, and lets you sort, filter and keep everything in one place. It works in current spreadsheet programs and has no macros.

| Workbook sheet          | What it holds                                                      | Book              |
|-------------------------|--------------------------------------------------------------------|-------------------|
| Start Here              | How the workbook is organized; status words; Owner and Who decides | Whole book        |
| Path Schedules          | Week-by-week tasks for all three planning paths                    | T07, T08 · Ch 4   |
| Task Board              | Every task, its owner, next step, target date and status           | T05, T08 · Ch 3–4 |
| Decisions & Open Issues | Decisions and open issues: who decides, owner and next step        | T06 · Ch 3        |
| Contacts                | Family, residence, professionals and services                      | T05 · Ch 3        |
| Fit Tracker             | Route openings, room measurements, priority furniture and fit      | T04 · Ch 2        |
| Inventory               | Every room and item, with its destination and owner                | T09 · Ch 5        |
| Heirloom Record         | Significant items: wishes, interest, advice, decision, handover    | T10 · Ch 6        |
| Vendors                 | Mover comparison, other services and bookings                      | T11 · Ch 7        |
| Budget                  | Estimated and actual costs; deposits and refunds                   | T12 · Ch 7        |
| Address Changes         | Every organization told of the new address                         | T14 · Ch 8        |
| Documents               | Where important documents are kept                                 | Ch 8              |
| Essentials              | Hand-carry and first-days items                                    | T13 · Ch 8        |
| Move Week               | Move Week Countdown with owners and dates                          | T15 · Ch 9        |
| Move Day                | Move-day schedule and your parent's day                            | T16 · Ch 9        |
| Room Sheets             | Labels and placement for each room at the new home                 | Ch 9–10           |
| Mover Inventory         | The mover's inventory through loading and delivery                 | T16 · Ch 9        |
| Setup                   | First-days setup tasks at the new home                             | T17 · Ch 10       |
| Room Plan               | What goes in each room at the new home                             | Ch 10             |
| Closure                 | Cleaning, collections, keys, room-by-room closure                  | T18 · Ch 11       |