



## Downsizing is family business for senior move managers

*Tap into a need that everyday consumers encounter and provide the solutions and service.*



*Jason, Barbara and Jaret Brietstein comprise Bright Transitions and Bright Start Movers, a family owned and operated company to help seniors move in Pompano Beach (Carey Wagner, Sun*

By Cindy Kent, Sun Sentinel

**Who:** Barbara Brietstein and her sons Jason Brietstein and Jaret Brietstein.

**What:** The Brietsteins founded senior move management company Bright Transitions and sister company Bright Start Movers in Pompano Beach.

The two family-owned business are based on the Brietsteins' personal experience helping Barbara Brietstein's parents downsize into independent and assisted living facilities.

Bright Transitions was launched in 2003 to get clients organized, packed and, once in their new location, unpacked down to the last detail. Bright Start Movers, added in 2007, focuses on truck transport. Family

"Our business is not like a normal moving company," said Barbara Brietstein. "It's based more on emotion. It's stressful for people who are seeking familiarly in times of change."

On the job, packers have made 911 calls for clients, fixed them lunch and done laundry. "There's a lot of hand-holding," said Brietstein. Jobs, scheduled for a move in 48 hours, might be postponed because a client is in the hospital.

With a down economy and a slow housing condo market, "basically we went out on a limb," said Brietstein. But referrals give the company steady business.

"Search engine optimization positions the company's brand on the Internet," said Jason Brietstein, chief technology officer. "Keyword searches are an essential part of how people find us."

The company tripled the size of its headquarters and expanded from three employees to 14 employees. They average about 40 jobs a month.

**The back story:** Helping her aging parents make several life-changing moves would become the ground work for Brietstein's new business. But first, she and her sister, Nancy Emerman, had to sort it all out for themselves.

Should they store or sell the furniture? Will vendors buy artwork, antiques? How are old documents shredded and disposed of? What will fit in the new place?

The knowledge gap and lack of consolidated information made even the most incremental task monumental, says Brietstein. She retired from her party planning business to assist them.

By the end of the experience and her parents' passing, Brietstein became the expert friends and family turned to for advice.

**The take away:** Brietstein's "family moving families" business concept works because she provides the customer service needed to manage the series of logistical burdens many consumers face moving and relocating seniors.

### Knowledge

**Build a network.** The Bright companies sponsor fundraisers. Employees participate in activities, serve on committees and join boards for organizations like the Alzheimer's Association. They keep current with aging issues and trends. "At the end of the day, it feels good," said Jason Brietstein.

**Create new business.** Sponsoring luncheon presentations and ice cream socials at senior communities allow the company to touch base with former clients and make new connections. Brietstein taps into her former event planning days by distributing "party favor leave-behinds" like branded markers and notepads

**Build authority and reputation.** Experience shows consumers a history of your business, says Jaret Brietstein. Industry, business recognitions and professional certifications show commitment to transparency. Having knowledge, and sharing it, positions you as the go-to source for information, solutions and making connections.

## The New York Times

### Leave the Stuff, Keep the Memories



**NEW CHAPTER** Judith Kertzner used a senior move manager in relocating to a town house from a five-bedroom Dutch colonial. "I had 55 years of memories in my old house," she said.

Kathy Kmonicek for The New York Times

By MARCELLE S. FISCHLER

Published: May 19, 2011

**JAY GOLDSTEIN** and his wife, Carrie, accumulated 15,000 books in the 46 years they lived in the Glen Cove split ranch where they raised their four children. Its sixth bedroom

became the second story of a library. All sorts of memorabilia and other hard-to-toss belongings accumulated in the attic and basement. In February, when their home went into contract for \$550,000, deciding what to take, what to dispose of and how to lay out their new \$8,050-a-month two-bedroom rental apartment at the Atria on Roslyn Harbor, an independent senior community in Roslyn, seemed overwhelming.

“Just cleaning out the attic was a major thing,” said Mr. Goldstein, who described himself as “lawyer by training, not a mover,” and was very busy taking care of his wife, who has a neurological disease.

With three grown children residing out of state, Mr. Goldstein, 75, decided to hire Barbara Feldman, a “senior move manager.” Her mission: clear out the house, call in an antiques dealer to look at some of the books, and arrange for charitable donations. She also needed to have their new apartment set up by their April move-in date.

Ms. Feldman, the owner of the four-year-old **A Nu Start NY** in Manhasset, estimates that she assists 60 to 100 older adults a year with the physical and emotional demands of downsizing from their longtime family homes into apartments, age-restricted condominiums and assisted-living facilities.

She consults with appraisers, antiques dealers, secondhand furniture dealers, charities that pick up, packers, organizers and clean-out crews. She arranges to distribute possessions to family and friends. After unpacking, she makes the beds, sets up computers, hangs artwork and rearranges Lladros on shelves.

She is one of at least 600 people who belong to the nine-year-old nonprofit **National Association of Senior Move Managers**. It was founded to meet a growing demand for such services, and it is not alone in having identified the market potential of downsizers. Among others is the million-member-plus National Association of Realtors, which has created a “seniors real estate specialist” designation. According to its Web site, people trained in the specialty are qualified to counsel home buyers and sellers age 50-plus “through major financial and lifestyle transitions.”

Michelle N. Cohen, the executive vice president and an associate broker at Laffey Fine Homes in Greenvale, who calls herself a “moving life coach,” is one of the association’s specialists. “They need direction and what they can take and what they can’t take” and what to do with the rest of their stuff, Ms. Cohen said of her clientele.

Before the downturn, Ms. Cohen said, homeowners were looking to trade up. Now, anecdotally at least, “there are many, many people who are downsizing; we are seeing more of that than going the other way.”

People who “had to sell” and are renting, she concluded, “are better off getting rid of the feeling that ‘I can’t breathe, I am strapped.’”

And yet “moving from the old place to a new one is very rarely easy, and can often be a traumatic event,” even for adult children. Recently, Ms. Cohen recalled, a successful entrepreneur was selling his widowed mother’s residence — and his boyhood home — in East Hills, so that she could move into a senior adult residence in Port Washington.

He “literally cried on my shoulder when he had to make decisions about which furniture to sell, which to throw out and which to try to save for Mom’s place,” she said. She helped him by

locating a service to declutter the house; a tag-sale operator; and a mover to transfer the few pieces being kept.

Costs for these services are computed hourly and depend on the scale of the project, said Fritzi Mazzola Gros-Daillon, an owner of **Transitions USA** in Huntington, who gave an estimate of \$1,800 to \$2,000 for the packing, unpacking and materials (though movers' fees are separate). For other jobs — sorting through belongings, looking for documents hidden in books, or negotiating with hoarders — a higher hourly rate applies, she said.

Last June, Mary Balberchak of Massapequa hired Transitions to bring her parents, Mary and Edward Malloy, back from the house in Port St. Lucie, Fla., where they moved upon retiring 25 years ago, to a two-bedroom apartment in an age-restricted community in Farmingdale.

“They were completely instrumental in the move,” Ms. Balberchak said of the service. “I am the mother of two elementary-school children and there was no way I could do that.”

Kathleen Mazza, their senior move manager, flew to Florida and determined what they wanted and needed to be shipped, donating their leftover food to a local food pantry and excess clothing to Goodwill.

She made sure their cable and telephone services were shut off, that Mrs. Malloy had her medications, and that Mr. Malloy's car was transported on the moving van. Back on the Island, she did the unpacking.

In March, after two years of indecision, Judith Kertzner, a retired reading teacher, sold the Dutch colonial in Brightwaters where she had lived for more than five decades. Most older people “don't move, because they can't imagine doing it,” said Ms. Kertzner, 86, who bought a two-bedroom ranch in a gated Bay Shore town-house community.

As a moving gift, her four far-flung sons, ages 49 to 61, hired Diane Landau, the owner of **Memories on the Move** in East Meadow, to help. Sorting out what to take along, Ms. Landau said, “is easier for me because I don't have this emotional attachment to it.”

And although Ms. Kertzner described Ms. Landau as “very understanding,” the realities of moving to a smaller place were painful anyway. “It is a hard adjustment,” she said, “because I had 55 years of memories in my old house. I took a lot of them with me, and I have no room for them.”

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## Does Your Parent Need a Senior Move Manager?

By Missy Sullivan

My dad's loss of independent living came suddenly. He was a widower in his 80s and living in a one-bedroom apartment, but several mini-strokes had gradually taken a toll on his mobility and mental acuity. After the third or fourth such event, his doctor dropped the bomb: When he leaves the hospital this time, he can't go home. In short order, we (his kids) needed to identify and tour assisted living facilities, grapple with the paperwork and finances, pack up his belongings, and figure out how to best offload his soon-to-be-excess furniture.

We had about four days to figure it all out.

As families go, I'd say we're more equipped than many to deal with such a task: We're five in all—along with our spouses and kids, a small army—and we all live on the same coast, three in the same town as Dad. And thankfully, Dad had already undergone a series of moves that had gradually winnowed down his possessions. All good.

But make no mistake: Whether a move is forced or voluntary, health-triggered or not, helping elders get to the next phase or "right-size" their lives can be a massive, emotionally draining undertaking—especially if it involves getting them unstuck from homes where they're weighed down by a lifetime worth of memory-laden possessions. "Stuff can really, really bring you down," says Jennifer Pickett, associate executive director of the National Association of Senior Move Managers, a small, but burgeoning group of professionals aimed at facilitating the move process. "It can be paralyzing to an older adult."



If the term "senior move manager" is an unfamiliar one, you're not alone; membership in the national association currently hovers around 600. But it's a field you'll likely hear a lot more about as our population ages rapidly and the average occupancy rate for senior housing inches back up. (It now hovers close to 88 percent, having inched up for four straight quarters, according to new data from the National Investment Center for the Seniors Housing & Care Industry.) Some senior move pros launched their businesses after careers as nurses, social workers or senior care administrators. Others were professional organizers-cum-closet-wizards who saw the demographic writing on the wall and jumped into this niche. Industry experts say they'll cost, on average, \$40 to \$50 an hour, but can run over \$100 an hour in bigger urban centers.

What do you get for that price? In theory, a far less stressful late-life transition—not just a clipboard jockey who's organizing the whole shebang (distributing to family, donating, selling, dumping, planning, packing, moving), but a compassionate facilitator steeped in the ethical and safety issues of dealing with this often-vulnerable population. In practical terms, that means they know to keep the doors shut while they're working in the home of a client with dementia, and they won't just toss prescription bottles in a moving box, where they can easily get lost. And it means that before they sell off the client's beloved collection of antique teapots, they'll help

ease the psychic pain of the loss by encouraging the owner to share the stories behind objects, maybe even help make a scrapbook. "They do a lot of listening," says Pickett.

The problem is this: This is a field with virtually no barriers to entry, where industry "certifications" carry sometimes dubious value. So who do you want rummaging around in mom's underwear drawer and how do you know if they're trustworthy? Experts suggest checking references, making sure that the person is bonded and insured, and has had a criminal background check—and asking for the scope of work and cost to be laid out in writing in advance. Lastly, make sure they disclose any relevant monetary relationships. I've heard from folks in the field that, especially during the downturn, assisted living facilities hurting for residents would often offer to pay the fee of a senior move manager in order to help a potential resident to get unstuck from their home.

## Angie's list

### Senior move managers help Charlotte residents downsize

April 13 2011



*Photos by Jeremy Deal  
by Meranda Watling*

After Anna-Louise Fitzgerald's doctor diagnosed her with a heart condition, the active 68-year-old decided to put her affairs in order. That meant downsizing by selling her home in Fort Mill, S.C., and making plans to move to the Southminster Retirement Community in Charlotte, where she'll have easy access to nurses and others her age.

"My children are all in their 40s and have children," Fitzgerald says. "If something happened to me, caretaking is a full-time job. That's stress I don't want them to have."

Making the decision to move was easy, Fitzgerald says. But deciding which pieces to keep and what items to toss or donate? That proved to be more difficult because of the large quantity of things she's accumulated during her lifetime. On the advice of Southminster, Fitzgerald hired a senior move manager to help make those decisions and arrange the move details.



"It's the best money I ever spent at this age," she says of the \$7,000 she expects to pay Smooth Transitions Charlotte, a national franchise that helps seniors downsize and coordinate their moves. The company has multiple highly rated locations on the List.

The senior move management industry helps aging adults transition into smaller homes, apartments or nursing homes.

According to the National Association of Senior Move Managers, founded in 2002 and now boasting more than 600 members, its most popular services include move planning, oversight of the actual move, unpacking and setting up a new home.

Move managers require no certification or special licenses: They refer licensed moving companies to perform the move.

Some seniors hire move managers for themselves, as Fitzgerald did, while other clients arrange services for relatives because they may be too busy or live far away.

When Angie's List member Pat McLaughlin of Charlotte moved his 83-year-old mother-in-law from her 2,300-square-foot home of 20 years into a 1,000-square-foot senior condominium last year, he says he didn't know such services existed - or how much work the move would entail. He and his wife took on the task of packing and selling the home, and they hired highly rated Gentle Giant to move everything his mother-in-law wanted to keep.



"What was really important when we hired Gentle Giant is my wife tipped them off that this was going to be very difficult for her mother, and they were very responsive to that," McLaughlin says. "They were very conscientious, sympathetic and considerate of my wife's mother, rather than just moving the furniture, and that helped a lot."

One side of Anna-Louise Fitzgerald's garage is dedicated to items that will be moved to her new home. Others will be donated, purged or passed down to her children.

Gentle Giant, with franchises in several states, trains its crews to work with specific client needs, such as those who find it difficult to emotionally detach themselves from their belongings, says Charlotte branch manager Jon Vogel. They also offer senior move management services. "When you're going from 2,500 [square feet] to 500 square feet, there's a lot of stuff that has to go," he says.

Gentle Giant works with local agencies to donate used items, Vogel adds, and their senior clients see that their donations support a good cause.

Mary O'Gorman, who oversees Gentle Giant's national senior move management program, says more people are asking for help. Her services range from \$400 to \$1,000, depending on chosen services and how long the tasks take, and she helps with everything from organizing the items to unpacking boxes in the new home.

"A lot of people have mentioned they chose Gentle Giant because we had this service," O'Gorman says. "It's worth it to them because as people age, they have money put aside and they know this move will be the last move."

Tina Braun of Smooth Transitions helps sort Anna-Louise Fitzgerald's unneeded possessions into donation boxes.

# Portland Press Herald

March 27, 2011

## **Savvy Senior: If you're ready to move, helpful services available**

By JIM MILLER

**DEAR SAVVY SENIOR:** Are there organizations or businesses that specialize in helping seniors sell their house, find a new home and help them relocate to it? My wife and I are interested in downsizing from our home of 35 years, but need some help with the entire process. What can you tell us? -- Slow Movers

**DEAR SLOW:** The process of selling a house and moving to a new home, or downsizing to a condo or an apartment, is a huge job that can be physically and emotionally exhausting, especially for seniors. Fortunately, there are a variety of specialized services available today that can help make it a little easier. Here's what you should know:

To get help selling your home and finding a new one, a good place to start may be with a Seniors Real Estate Specialist, or SRES. These Realtors have received special training, making them better-equipped to help older clients through major financial and lifestyle transitions involved in relocating, refinancing or selling the family home.

SRES designees are educated and knowledgeable in such areas as reverse mortgages, senior housing options, downsizing, universal design, as well as ways to use pensions, 401(k) accounts and IRAs in real estate transactions. They can also help you steer clear of loan scams that victimize older borrowers. And if you need help from other professionals, an SRES can put you in touch with qualified home inspectors, movers, attorneys, CPAs and other experts.

To learn more or to search for an SRES in your area, visit [sres.org](http://sres.org) or call toll-free (800) 500-4564. The SRES Council also offers a free "Moving On" guide to help seniors with the decisions and transitions that come with moving. To get a copy, call the same toll-free number or visit their website.

To help you get packed-up and move, another specialty service you should know about is "senior move managers." These are organizers who assist older people with the challenges of relocating. They can minimize the stress of this major transition by doing most of the work for you.

They can help you pare down your belongings, decide what to take and what to dispose of, recommend charities for donations and help sell your unwanted items. They also get estimates from moving companies, oversee the movers, arrange the move date, supervise the packing and unpacking, have the house cleaned and just about anything you need related to your move.

Costs vary depending on the services and size of the move, but you can expect to pay between \$1,000 and \$5,000, not including the cost of movers.

To locate a senior move manager, visit the National Association of Senior Move Managers website at [nasmm.com](http://nasmm.com) or call (877) 606-2766. But before you hire one, be sure you ask for references from previous clients and check them. Also find out how many moves they have actually managed, and get a written list of services and fees.

# THE TIMES

By Christine Bryant Times Correspondent  
Sunday, March 20, 2011

When it's time for older Americans to downsize, it's a task that places enormous pressure on the senior as well as family members involved. When the family members do not live nearby, the stress associated with the move compounds. One local company, however, is working with seniors to make this new change in their lives a smooth transition.

"We realized there are so many seniors out there without family nearby," said Nikki Husiar, co-owner of Moving Places, a senior move management company. "The kids would fly in and want to spend time with their parents and not with their things."

Barb Pequet, Husiar's mother, has seen first-hand the amount of preparation and work that goes into



moving. For years, she ran a move management team, but it wasn't until 2009 that she and her daughter decided to focus on a specific group of people who the mother-daughter team say needed them the most.

"We took ourselves out into the public and we realized the need is so great," Husiar said. In addition to helping residents sort through their homes and decide what to take with them when they downsize into an apartment or senior living facility, Moving Places also assists them with utility

transfers, disconnections, sorting through insurance options, space planning and supervising the move. The business also offers a service where employees unpack and place all the items in the new home so it's move-in ready for the client.

"We take care of all the downsizing needs of seniors, as well as take care of all the relocation needs," Husiar said. "Depending on the community and apartment they're moving in, we know what's going to fit in that apartment."

They also have recently started a "what's left behind" division, Pequet said.

"Once the senior goes into the community, the household has a lot of stuff behind," she said. "Whether we use auction services, donations or whatever means we can, means we can leave the property empty." Ultimately, it's the client who runs the show, but without the stress of arranging the details.

"What we want people to realize is that Moving Places is about letting the senior remain in charge," Pequet said. "It's extremely important that they know they are in charge of the entire process."

After opening in November 2009, the business immediately gained footing. After investing about \$10,000 of their own money to pay for the basic necessities like office equipment, service fees, bonding and insurance, Husiar and Pequet almost immediately saw a return in their investment.

"We started turning a profit by the fourth month we had the door open," Husiar said. "It has been steadily growing ever since then."

Operating the business out of their Valparaiso home has also helped them save on overhead costs.

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## Today's Moving Companies Have Much to Offer Realtors And Their Clients

MONDAY, 28 FEBRUARY 2011

DAVID HATTON, EDITORIAL TEAM



Canadian moving companies admit they have heard all the complaints about damaged furniture, overinflated bills and bad promises.

But it doesn't have to work that way, according to industry executives.

"There have been real problems with some unscrupulous operators in the past," says Dan Hopkins, chief operating officer and vice president, development and operations for

Toronto-based Two Men and a Truck Canada. "That's why the industry needs to help the consumer and work hard to earn their trust."

The problem intensifies during the peak moving season of June to early September, he explains. Most apartment and condominium buildings have moving vans lined up waiting for elevators on weekends.

"That's when demand is the highest and these unscrupulous operators can swoop down and take advantage of consumers. A lot of people are moving at a stressful time in their life and they look for the cheapest possible quote."

Hopkins says some moving companies will show up the day of the move with a thick contract for the customer to sign. If the consumer says they want to read it before signing, the mover reminds them they are being paid by the hour.

"You would never buy a car or a house like that and this is already a stressful enough day," he explains.

"What happens next is the movers will put all a person's worldly belongings in their truck, close the door at the back, and then tell them they didn't realize there were three flights of stairs or something like that. The consumer has to suddenly come up with a couple of thousand dollars in cash or they won't release their worldly belongings," Hopkins says.

In one such case, Toronto Police laid 160 charges last summer against an Ontario moving company owner and his employees, ranging from extortion to possession of proceeds of crime and mischief. The company would quote an initial low price then double or even triple the rate midway through the job. If the customer refused, the company threatened to hold their goods in a storage locker.

Many victims called police when this happened but they pointed to a clause in the contract in small print that said excess charges may apply. Police then told them it was then a civil dispute and they couldn't intervene.

"That's why people really need to check out who they are dealing with," says Hopkins, adding Two Men and a Truck Canada has a 94% customer referral rate from existing moves and a 1% damage rate.

Two Men and a Truck Canada franchisees will go through a home entering all the furniture and possessions on an electronic device that uses proprietary software called "Movers Who Care", he says. The software calculates the average weight and size of each item as they go along so there is enough room in each truck and everything fits.

"If there is anything different when we do arrive the day of the move that the customer forgot about perhaps or wasn't sold at a garage sale beforehand, then we stop everything. Before anything gets loaded on the truck we would explain to the consumer that it wasn't what we originally discussed in the quote that was given to them beforehand. The consumer is in control at all times," Hopkins says.

"We would tell them the difference and if necessary, work out (additional payment) terms. They don't have to get six different relatives running to bank machines for cash because there is only a \$500 limit on their bank card. It's all about being fair to the consumer."

Hopkins even helped develop a "Consumers' Bill of Rights" that details what customers should expect from their moving company and provides a 24-hour "hotline" to deal with any of their issues.

There was also the "Grandma Rule" throughout the company. "I told our people to think of how their grandma would like to be treated and show our customers the same respect," he says.

Vicky Riley Keyes, meanwhile, helps grandmothers and other seniors through her "senior move management company", Red Coats Moving Solutions.

"Senior move management is really a new service that I started in 2004, and was pretty much the first company in Toronto to offer such a service," she says. "There is an aging population out there. Quite often their adult children live in other cities across Canada and (seniors) need help moving an entire lifetime worth of possessions."

The company is ready to handle increased demand as baby boomers start to mature and want to downsize their home for the retirement years.

Riley Keyes and her staff will work with an elderly client to provide a range of services, including downsizing, de-cluttering, home staging and moving. Moving services are contracted out, she says, under her watchful eye.

"You should always get two or three estimates, check references and ask how they wrap things like furniture. Our movers will always use blankets to protect (furniture) corners so they don't get damaged. You don't want anyone who uses Saran Wrap or anything."

Riley Keyes started a three year term earlier this year on the board of directors for the US-based National Association of Senior Move Managers. She was the only Canadian in the industry association back in 2004 out of about 70 members. "Now there are 20 of us out of around 500 members in the entire group," she says.

Hopkins and Riley Keyes both say they get a lot of referrals from realtors and will have booths at the Toronto Real Estate Board's upcoming Realtor Quest show, coming up May 4 and 5th at the Toronto Congress Centre.

"We work with realtors quite a bit," says Hopkins. "They can tell a client that if you give me the listing, I can guarantee you have a reputable, reliable mover available for the day of your move, which is difficult to book in the prime season, and even arrange for \$150 worth of moving supplies at no extra charge."

He says franchisees can offer that guarantee because if all their trucks and staff are booked, they are able to ask a nearby Two Men and a Truck Canada franchisee for help.

"The client will be able to see that the realtor is affiliated with quality and has the right contacts in the community to help," says Hopkins. "Quite often that makes a difference in getting the listing."

Riley Keyes says about 20% of her business comes from real estate referrals. "We work with a lot of realtors, especially if they have a senior client who has been living in their home for a number of years. We can help reduce their anxiety, prepare the home for the sale through staging and decluttering, then assist with the move."

"We are on the same team as the realtor when it comes to helping the client sell their home and move into a new home."



## Moving Far More than Possessions

*Relocating to a smaller place or to a retirement home can be upsetting, so a local venture offers to step in to take the emotion out of the process*

By SANDRA BRETTEING  
HOUSTON CHRONICLE  
Feb. 26, 2011

Carol Brooks, who owns Moving Matters, says: "There are as many reasons for seniors to move as there are senior citizens themselves." It takes more than bubble wrap and strapping tape when moving senior citizens from family homes into retirement communities or apartments.

The job also requires diplomacy to negotiate which mementos, heirlooms and favorite objects make the transition with them, said Carol Brooks, whose Houston small business, Moving Matters, coordinates such moves.



"There are as many reasons for seniors to move as there are senior citizens themselves," Brooks said. "Many of my clients are forced to downsize because of physical limitations. Others go into a retirement community after the death of a spouse. Whatever the reason, there's a lot of hand-holding required."

Brooks started the company in 2007 after hearing a radio report about an up-and-coming industry that catered to senior citizens. She just had been downsized out of a career in risk management at a rehabilitation hospital, and

the idea struck a chord. As a risk manager, she often worked in conflict resolution with families. "I'm not a counselor, and I leave that to the professionals," Brooks said. "What I provide is an objective third party who's able to take the emotion out of a move."

### **Nationwide organization**

One of Brooks' first steps was to join the National Association of Senior Move Managers. That group includes almost 600 companies that offer moving services for seniors.

"The industry sprang up about 15 years ago on the East Coast, in the heavily populated cities," said Mary Kay Buysse, the group's executive director. "As more people were aging, they found that moving companies alone weren't able to meet their needs. Now, we still work with moving companies to haul things, but we like to say that we move the people, not boxes."

Along with serving as a support system, the members of NASMM refer clients to each other when the move involves another state, Brooks said. It was at that group's national convention that Brooks studied how to market her company and decided to focus on senior centers and assisted-living facilities, among other places.

Brooks said she invested \$20,000 of her own for startup capital. She said revenues have doubled each year, although she declined to provide specific figures.

### **Working out what fits**

One of the biggest issues for clients, Brooks said, is to give up belongings when a new home is markedly smaller. Brooks said her first step is to create a floor plan of the area with the client, then decide what can fit.

"Sometimes the furniture isn't safe anymore, so we deal with that first," Brooks said. "Then, together we decide if things should be donated, given to children, auctioned off or consigned."

"My initial consultations are never less than two hours."

Brooks has noticed in the process a cultural shift away from collecting china, silverware and other things that take time to care for.

"Today's seniors often have multiple sets of china and heavy silverware," Brooks said. "But in today's disposable society, those things aren't valued as much. We have to find a new place for them when the children and grandchildren just aren't interested."

### **Unpacking and decorating**

In addition to providing in-home consultations and liquidating unneeded items, Brooks and her crew pack possessions, arrange to have them transported to the new home, then unpack the belongings and decorate the space according to the agreed-upon floor plan.

"That's the payoff for me," Brooks said. "The hugs and the tears when people see how good their new space can look."

"We all know that our population is aging," Buysse said. "For many seniors, it's a loss - maybe of a spouse or their health - that necessitates a move. We don't want them to feel that they're losing even more by moving."

### **FOR MORE INFORMATION**

Go to [www.seniormovingmatters.com](http://www.seniormovingmatters.com).

## Senior Movers, Business takes on many tasks in a senior's move.

Wednesday, January 19, 2011

By Desiree Feigel-Dart



Mike Greenlar/The Post Standard

Douglas Carmichel stands inside the library of The Nottingham, one of the living facilities he has helped people move to.

*Editorial assistant Desiree Feigel-Dart recently interviewed Douglas Carmichel who runs a business helping seniors move out of their homes.*

### Just the facts ...

**Business:** Senior Move Management

**Address:** DeWitt

**Owner:** Douglas Carmichel

**Hours:** No set hours

**Telephone:** 420-9019

**Web site:** [cnyseniormove.com](http://cnyseniormove.com)

**Name:** Douglas Carmichel

**Age:** 56.

**Where do you live?** DeWitt

**Where are you originally from?** DeWitt

**How long have you lived here?** 56 years.

**Education:** Bachelor's degree from Syracuse University.

**In a few words, describe your business:** Planning, coordinating and overseeing all aspects of a senior's move, including downsizing and estate dispersal.

**Number of employees:** Five.

**How long have you owned it?** Since 2006.

**What did you do before becoming a business owner?** 25 years as administrator in nonprofit and health care organizations.

**What led you to open the business?** After moving my own parents, I realized how time-consuming and involved the process was, and that there were no agencies that offered that type of assistance in this area.

**How did your business get its name?** I chose to use my own name because I take the lead in organizing all moves and personal ownership in the services we offer.

**Describe a typical day:** One of the things I enjoy most is that every day is different. Generally, though on any given day we could be meeting a new client to begin planning a move, discussing timeframes with family members or visiting the new residence to lay out a floor plan. We might be assisting the client with deciding what they will move and how to downsize; this can involve arranging for donations, house sales

or auctions depending on their preference. On a day that the client moves, we will have arranged for the packing and movers. We will oversee the actual move to ensure furniture is arranged according to the plan. Boxes are unpacked and the new residence will be settled, beds made, dishes put away, bookshelves arranged and all packing materials will be removed. Following a move, we might also be cleaning out a home and preparing it for sale.

**What's the hardest part of running the business?** Describing the business in less than 30 words.

**What's the nicest thing a customer has said to you?** You made this move so much easier than we ever thought it could be.

**Do you have a busiest time of the day, week, month or year?** Following holidays when family members have been visiting and realize it is time for their relatives to start planning a move to a more appropriate residence.

**Is there someone who has helped you out?** In the early stages of the business, a friend provided assistance developing the initial business plan.

**What advice would you give someone starting out in a business like yours?** It takes a long time to develop a network of reputable resources such as auctioneers, movers, appraisers, etc.

**What is the best piece of advice someone has given you?** "Never forget how traumatic, stressful and confusing a transition like this can be for the entire family."

**Where do you see your business going in the future?** I would like to see the volume of business to grow as well as our reputation as a thoughtful partner to seniors in transition.

## NorthJersey.com

### Big decisions moving to smaller quarters

Sunday, January 16, 2011

BY DONNA ROLANDO

It's a task daunting enough to vex contestants on a TV reality show — downsizing from a home of 40-plus years and doing it all in just a matter of weeks.

That's the kind of pressure faced by many empty nesters, a lifetime of memories to condense into smaller quarters and sometimes under tight deadlines associated with the sale or purchase of a new home. The challenge of finding a good use for beloved memories that no longer fit can be taxing as well.

Jill Baer moved her parents out of a Fort Lee apartment in July to assisted living near her home in California. The miles between Jill and her parents became too great as Mom and Dad suffered the health problems that often accompany old age.

#### Tips to smooth a move at any age

- \* Create a floor plan of the new place complete with measurements. Plan on paper first, where furniture and other items will best fit into the new home. Have items marked for correct placement.
- \* Ask yourself some key questions to decide whether a belonging is worth keeping. For things out of place in your downsized home, consider the best outcome. Is it something valuable for auction or tag sale? Is it an heirloom or something the adult children could use? Other outcomes might be a consignment shop, charity (perhaps for a tax deduction), or recycling.
- \* Be realistic. Many empty nesters have full closets in every bedroom, but they are not likely to have that luxury once they move. Also be realistic about lifestyle changes. The empty nester kitchen might see just a fraction of the use it did when the kids were little.
- \* If you're moving into a condo, be aware of the regulations in your new complex. Ask about storage space the condo might have available for its residents.
- \* Most move-planners steer their clients away from the expense of storage units, persuading them instead to take the time to go through and decide the fate of their possessions. "Most people tend to put too many things in storage," said Kathleen Checke of Checklist in Mahwah. "The more you move, the more it will cost you," she said.

- \* Seize the opportunity during the moving process to sort through life documents and create a file of important papers your adult children may need to view someday, said Checke.
- \* Consult with an expert on old toys and other collectibles that might have value.
- \* Pack what you will need on the day of the move, having medicine and other daily necessities readily available. Once the packing is done, give family members a firm deadline to look through the house for furniture and other items they might want to keep. Removing the clutter in this way can also make a house more attractive for sale.

But deciding what to do with 45 years of memorabilia in that home, including records from Mom's days as a professional singer, was a challenge. In fact because it was such a formidable task, Jill's parents kept putting off doing it themselves. As health concerns grew, however, Baer and her sister realized they would have to orchestrate the move.

"There's a whole life there. You have to be so sensitive to what you're going to keep and what to give away," Baer said. Looking back, Baer can say she gained from the experience because "by going through all their things, it told their story."



One precious item that simply had no place in their parents' new home was the piano that held so many fond family memories. The family took comfort in being able to present the piano to a doorman in the Fort Lee apartment building who had been so helpful to their parents over the years, and was also a music student.

"It made it a much easier transition for everyone," said Lorri Ashe, owner of Transition Guardians in Englewood, of how placing that piano with someone who cherished it eased the family's pain. This is one of the advantages of starting to plan your move early, and one of the top recommendations Ashe, a member of the National Association of Senior Move Managers (NASMM), makes to those downsizing.

Baer and her sister devoted a year to planning their parents' uprooting to Los Angeles. They hired Transition Guardians to handle aspects of the move, but the decision of what to do with what was theirs.

Not everyone, though, has the luxury of a year to plan before embarking on a move. When her husband, Edward, a longtime Manhattan doctor, retired, Nancy Shalhoub said they decided it was time to sell a six-bedroom house in Englewood and condense what they couldn't part with into their second home in Sea Girt.

The time frame to manage this monumental task was just three weeks. Shalhoub explained that it took some time to sell the Englewood home, and when they finally found serious interest, the buyers wanted to move in and settle down before their kids started school. "It was too overwhelming that we had to get out that fast," said Shalhoub. She too worked with Transition Guardians, one of many companies on the NASMM website, on packing and also to decide what to keep and what to get rid of. Unwanted items went to tag sales in both homes and an antique auction.

Finding a place for things that didn't sell was difficult because her four adult sons had little interest in furniture and heirlooms, Nancy said. A Lenox wedding set went to her daughter-in-law. Ashe said it's important to give busy families a deadline to go through possessions they might want. In the end everything will have to go, so indecision can be costly.

Donna Willmann, a founding member of NASMM and owner of Byron Home Inc., said one of the mistakes people make when planning a move is to pack up everything, thinking they'll figure it out later. That just

leads to clutter and confusion in the new home, which planning, based on a floor plan with room measurements, could avoid, she said.

Although the new home may have a quarter of one's former space, Willmann said that empty-nesters need to be realistic. With the children gone, many couples are living in just a small section of their home, so much of that larger residence will not be missed.

"You need to review your lifestyle and break it down into manageable pieces," she said, to best plan what's needed in the new home. Some questions to ask, said Ashe, are: Do you need it? Do you want it? Does it fit your new residence? And does anybody else want it? "Anyone who moves gets overwhelmed by the process. As you age it gets even harder," said Kathleen Checke, owner of Checklist in Mahwah, which helps many clients 80 and above with their moves.

"A lot of families don't have the time needed" to help their aging parents move — especially parents with physical limitations or those who have difficulty facing the reality of aging and the need to move. Staying on top of clutter and keeping organized is a great way to prepare for the moving process even years before a decision, said Checke.

Empty nesters often find themselves dealing with what adult children leave behind in the family home, and drawing them into the process to decide the disposition of these items.

This was the case for Aviva Farbowitz when her mother put her Teaneck home up for sale. She worked with Transition Guardians to rummage through her closets and "found a lot of stuff here I haven't seen in 10 years." Although the photos were precious memories to keep, most of the clothing and shoes will be donated, she said. Farbowitz said she figures that if she hasn't needed the items for 10 years, she doesn't need them now.

## Bellaire Examiner

### Managing the move for Mom and Dad

Wednesday, January 5, 2011 3:59pm

By CYNTHIA LESCALLEET

The Examiner

Surrounded mid-project by piles of books she loves, Trisha Gow, 75, realized she needed a little help winnowing her collection —and other possessions —before moving into a retirement community in the new year. "It does feel like starting over," she said of her decision to move from the apartment in which she has lived for many years.



During the pre-packing phase earlier this month, Gow said she was downsizing a little and dispensing with a few items so her adult children ultimately won't have to without her input. The help with the sifting and assessing came from Cynthia Williams, a senior move manager. The emerging sub-specialty of professional organizing offers end-to-end move services while being sensitive to the physical limits and emotional needs of older adults when they decide (or have decided for them) that it's time to move.

Williams of River Oaks found her experience as an interior designer, museum docent and antiques appraiser well-suited to helping organize and

manage home transitions for older clients. A member of the National Association of Senior Move Managers, Williams named her company Transitions MMM (Making Moves Manageable) to suggest a seamless process amid one of life's most stressful shifts. Williams jokingly calls herself "a professional daughter."

Unlike a family member with emotional ties to the client and the client's possessions, however, "I can come in and say the exact same thing" about what needs to be done with it and be heard, she said. That works both ways, she said. "The adult children don't always realize the emotional ties" of ownership and the difficulty of letting go of possessions (each filled with memories). "You have to be patient and diplomatic," she said.

Williams enjoys chatting with her older clients, who often share stories with her about the times through which they have lived. The adult children have often heard it all before, she said, and "don't want to hear it." They also might rush the moving process, which increases anxiety all round.

### ***From Move-out to Move-in***

With the support of Gow's adult children, Williams has been helping her client decide what to keep, repair, donate, sell, toss and dispense to family, friends and beyond. The two are also commiserating on how to arrange Gow's new home so she will feel right at home from the start.

Gow said Williams has been effective in monitoring when the tasks at hand were too overwhelming. Plus, she takes over when Gow's endurance lags. Along the way, Gow has appreciated having someone's objective opinion on whether to keep something or let it go. Gow thinks many older adults opt to stay put with their stuff because it's easier than revisiting a lifetime's accumulation ("The past comes at you.") but, "it has to be done."

### ***Holidays over, calls begin***

January is a busy time for organizers in general and senior move managers in particular, said Mary Kay Buysse, NASMM's executive director. As with summer visits, the holidays are a time of year when adult children (especially those unable to visit regularly) notice how their parents are really faring, from a health and independent living standpoint, she said.

Navigating a parent's housing transition can be challenging, said senior move manager Becky Hamilton of Hamilton Transitions in Memorial. She's also a member of NASMM. "There's a lot of psychology involved in what we do," she said. "It's also hard for adult children to let it go."

For clients, there is the idea of a move vs. the reality of the process. "Everything has meaning and a memory," Hamilton said. "We sit back and listen as they vent and reminisce." At the core of the transition, however, is that moving a parent is about more than the move.