

NASMM PRESS ARCHIVE • JANUARY – JUNE, 2008



Family Moving Guide - How to Help Your Elderly Parents Move

Spring/Summer 2008

By Allison Bisbey Colter

If your parents are getting ready to relocate to a smaller home or a retirement community, they're about to make one of the biggest changes of their lives. You may not be in a position to help with the heavy lifting, but there a number of ways to help make the process easier for them.

Be Respectful

One of the most important things you can do is to be respectful of what your parents are going through. "Adult children need to realize what a vulnerable position their parents are in when they move from their life-long home," says Nancy Pelham, a Dallas professional organizer and owner of Helping Hands Personal Service.

"They're having to let go of very meaningful things" -- not just possessions, but the home they're accustomed to, their friends and neighbors and perhaps their sense of independence.

Avoid being condescending. People tend to coddle the elderly, but "they're the same on the inside as everyone else," Pelham says.

Help Plan

Because relocating is such an emotionally-charged experience, it typically takes seniors longer than it would younger adults to sort through their possessions and decide what to keep and what to get rid of, so get started early.

Parents may need help organizing a garage sale or transporting items to charity or packing what's left. Once the move is over, they may need help cleaning and putting things away and settling into the new environment.

Be Patient

When an adult child helps an older parent move, there can be a lot of emotional baggage.

"Sometimes things get testy," says Mary Kay Buysse, executive director of the National Association of Senior Move Managers. "The adult child has a million other things (he or she) needs to be doing."



There may be competition among siblings for a piece of furniture or family heirlooms the parent is passing along, or resentment if one sibling feels another isn't helping enough. Try not to make the experience more difficult for your parents than it already is.

Use the Time to Reminisce

When an elderly person goes through closets and attics, going through things they haven't looked at in years, it's going to take longer than an adult child would like. Rather than rushing your parents, use the time to share stories and reminisce. It will help them.

Provide Emotional Support

It's important not to downplay your parents' feelings of sadness or anxiety about letting go of their old life. But it can be helpful to remind them of how much easier their life is going to be in the new place.

"Help them see why or how they will be benefiting," Pelham says, noting that a new home might have a more active social environment, or be easier for them to get around.

Allison Bisbey Colter is a freelance writer in New Jersey whose work has appeared in The Wall Street Journal and American Banker. She is a former editor at TheStreet.com and a former reporter for Dow Jones Newswires.



RELOCATION.COM

Family Moving Guide: Nation Preps for Wave of Senior Citizen Moves

Spring/Summer 2008

By Allison Bisbey Colter

Most seniors would like to stay in their current homes as long as possible. Still, the time comes when the four-bedroom house becomes too much work, or they need help with daily activities and have to consider downsizing to a smaller place that needs less upkeep or is closer to family members.

The number of seniors who find themselves in this position is steadily rising as the population ages. "Something's happening that has never happened before," says Mary Kay Buyse, executive director of the National Association of Senior Move Managers, a Washington, DC trade group. "Two populations are hitting later life simultaneously: There are 68-year-olds caring for an 88- or 90-year-old parent.



Buyse says 70-somethings -- the so-called “Silent Generation” -- are finding it more challenging to move their parents than 45-year-olds might.

“Then too, people have never been so dispersed; so many older adults do not have family nearby” to help them move, Buyse says.

The first of the nation’s 78 million Baby Boomers are reaching retirement age, portending a future wave of senior moves, although so far they are largely staying put. A survey sponsored by the American Association of Retired Persons indicates that just 6% of Boomers plan to live in a smaller residence over the next five years.

Still, this generation is so big that there will be more of them doing everything. Buyse says Boomers who enlist NASMM members to help with a parent’s move often use the same senior move manager when they move into an active retirement community.

Senior citizens have unique needs when it comes to moving. They may not be up to the physical burdens of lifting, reaching and bending. If they’re moving to a smaller space, they also need to determine what to bring, where to put it, and to deal with the sale or donation of items that will be left behind. “Most people who are moving from their life-long home have considerable possessions,” Buyse says. “They need help finding a new home for a lot of it.”

Senior moves are also emotionally difficult, particularly if they aren’t voluntary: Change in routine, saying goodbye to friends and neighbors, concerns about a new place.

“A lot of older adults become more isolated, and they have to move from living alone or with one other person to congregate-living,” Buyse says. “It’s like going back to college and living in a dorm.”

In the past few years the senior move industry has sprung up to help seniors -- and their children -- with the transition. NASMM’s membership has mushroomed to 450 from just 70 two years ago. They helped with some 15,000 senior moves last year. They serve as the nearby family that the senior might not have, making the moving-company arrangements, packing and unpacking boxes, and helping set up a senior’s new home.

Allison Bisbey Colter is a freelance writer in New Jersey whose work has appeared in The Wall Street Journal and American Banker. She is a former editor at TheStreet.com and a former reporter for Dow Jones Newswires.



RELOCATION.COM

Helping a Senior Downsize



Spring/Summer 2008

By Allison Bisbey Colter

When Nancy Pelham's mother, now 80, was ready to downsize to a smaller home, she made a list of the possessions she wanted to give away and sent a separate copy to each of her four daughters, instructing them to put their name next to anything they wanted and send it back.

"She said, 'I'll decide who gets what, but if I don't know what you want,' I can't give it to you," Pelham says.

Pelham, a Dallas professional organizer and owner of Helping Hands Personal Service, advises older clients who are preparing to move to a smaller residence to do something similar.

If seniors don't have adult children who want these possessions, they may have nieces, nephews or grandchildren. "But if they discover there is no one (in the family), they can start thinking about how to maybe make some money off this to help pay for the new place or cushion their lifestyle."

That could mean hiring someone to run an estate sale or taking items to a business that sells things on eBay.

Figuring out exactly what to keep can be a challenge, if say, a senior is moving from a 3,000 square foot house to a 1,000 square foot apartment or an even smaller space at an assisted living facility. Pelham helps clients get a floorplan of their new space, and will measure it herself if necessary, making note of such items as where the outlets are and the number of closets.

Another important consideration is whether seniors will have their own kitchen, just a microwave or will be eating in common areas.

With this information, Pelham can help seniors decide exactly how much furniture and other possessions they have room for in their new home. Computer software or simple cutouts made to scale can help seniors visualize where things will fit.

Pelham has some tricks for keeping clients organized before the move: Colored sticky dots can be used to designate what seniors are taking with them, what they are selling and what they are giving away. A spare room, or rooms, can serve the same purpose.

Mary Kay Buysse, executive director of the National Association of Senior Move Managers, has another tip:

If an older adult has 10 kitchen cabinets, and there are three at the new living space, tape off three cabinets in the old space and say, "Everything you want to take has to go there."

Buyse adds: “Lots of people have one or two pieces of furniture that really stand out, that are a part of their history; make sure there is space for that.”

Allison Bisbey Colter is a freelance writer in New Jersey whose work has appeared in The Wall Street Journal and American Banker. She is a former editor at TheStreet.com and a former reporter for Dow Jones Newswires.

ThisWeekOnline.com

Helping seniors make the move

Published Friday June 6th, 2008

by Hanne Armstrong, This Week Staff

Downsizing a home can be tough at any age, but two local companies are helping to take the stress away for the zoomer generation

At some point many, if not most, of us, will face the problem of moving from our home of many years into smaller, more manageable quarters. Moving at any time of life is a challenge, but when necessitated by your own health or ability to look after yourself, it can be extremely painful and stressful.

Downsizing is never easy, but it can be especially tough for those in the same home for many years.

In the Moncton area there are two companies which, for a fee, will help you or your loved one through the emotional, organizational, and physical problems of 'senior downsizing', or 'rightsizing'.

"Downsizing is a tough one," says Kim Eagles, Professional Organizer and owner of Kaos Solutions. "We help narrow things down and keep things positive. Concentrate on where you're going, not where you've been, and on what you're keeping, not what you're leaving behind."

Kim started her company in 2005, and has a Level 2 Certificate in Chronic Disorganization. Kaos Solutions tends to focus on residential and office moves, but Kim is qualified and sensitive to the problems seniors face when confronted with leaving their home.

Karen Geldart, on the other hand, is in the start-up phase





of her business, Graceful Moves, which specializes in helping seniors move.

"I got the idea for my business when I watched an elderly neighbour in Riverview go through a necessary move," Karen recalls. "I already had a Masters in Education and Counselling, am a licensed real estate agent, and have now taken training courses and belong to the National Association of Senior Moves Managers."

Both Kim and Karen went to the U.S. for their training, as the industries of Organization and Senior Moving are established there and not yet in Canada.

"I sit with the seniors," explains Karen, "and we make a floor plan of their new place. That makes parting with things a practical thing, maybe not so emotional. I let them share their memories with me if they want to, and help liquidate their assets to finance the move. Sometimes that means a garage sale, an auction, or even calling in a appraiser."

Both Kim and Karen seem sensitive to the feelings which seniors might experience when forced to move, and both have the same advice to offer: begin 'downsizing' before it becomes a necessity. What do you never use any more? What is broken and won't be repaired? What do you want to give to certain people or places? Then act on these observations.

When asked if this is a sad job, Karen replied,

"It can be, when there's conflict in a family. But it's a new phase of life, and everything's different for everybody. You're helping people, both the senior and their adult children."

Karen has done one presentation on her company's behalf, and has another planned for June 11 in the Community Room of the Sobeys on Vaughan Harvey. It begins at 7 p.m., and seating is limited. Karen will be joined by Investment Advisor Julie McSorley of RBC Dominion Securities.

She can be reached by email at karen@gracefulmoves.ca, or by phone at 875-3262. Kim can be reached at 384-5267 or online at kaosolutions.ca. When the time comes, either for yourself or a cherished relative, it might be an idea to consider involving a neutral professional in that downsizing move.

JACKSONVILLE
Business Journal

Elderly market spurs new industry
Friday, May 23, 2008

Jacksonville Business Journal - by Mark Szakonyi Staff Writer

NORTHEAST FLORIDA -- Faye Shute's mother was fearful of anyone, especially a stranger, "trashing" her possessions, which had accumulated in the garage of her Jacksonville home for two decades.

Senior move manager Susan Severson put her worries to rest. Nothing was boxed or thrown out without the 84-year-old woman's approval.

And Severson listened patiently to the stories attached to various items and made "Momma" a part of the process, Shute said. Unfortunately, not all those who make it their business to provide services to the elderly behave like Severson.

"Often they ignore them and just talk to the children," Shute said. Seniors "want to know what's going on."



The relatively new industry will expand, as the state's elderly population is expected to reach more than 10 million by 2030, according to a Florida Legislature analysis. Fewer children living near their parents increases the need for someone who can handle a move, the de-cluttering of homes or both.

Sharon Franzen of Florida PropertyPros Inc. is helping Melvin Chang downsize from his home to an

independent living facility.

Industries catering to seniors are expected to grow as the more independent, healthier and wealthier baby boomer population retires. Compared with a decade ago, fewer elderly residents go into nursing homes and they instead function independently or with community assistance, said Linda Levin, executive director of Elder Source, a private nonprofit aging resource center for Northeast Florida.

This translates to a bigger market for industries geared to serving the aging baby boomer population. "They have more disposable income," Levin said. "That is driving some of the changes, and you're going to see more."

Moving on up

Although the exact number of senior move managers in the country is unknown, the National Association of Senior Move Managers has added about 175 members since September, bringing its membership to more than 400, spokeswoman Jennifer Pickett said. Increased media coverage



has spurred interest for people looking for a second career, especially those who have worked with elderly people in the past.

Association members managed 15,000 moves in 2007, with a \$30 million impact. Only about half are certified by the Senior Relocation and Transition Society of America, which requires prospective senior relocation and transition specialists to pass criminal background checks, meet insurance requirements and pass a written test.

In an unregulated industry, it's important that prospective customers realize that some businesses don't have the tact or even trustworthiness that the title of senior move manager requires, said Nan Hayes, CEO of MoveSeniors.com, a database of certified senior move managers.

Hayes said it's more about comforting customers in an uncertain time and working at a pace that won't rattle them, as opposed to getting boxes out the door as quickly as possible. Trust is paramount because an unscrupulous move manager can pocket items or not give clients the full return on possessions sold or auctioned.

Although no state agency monitors the scope of scams perpetrated on the state's elderly population, a newly reinstated program at the Stetson University College of Law aims to do so. The Elder Consumer Protection Program also provides prevention education to the community and assists those scammed, said Slade Dukes, Elder Consumer Protection fellow.

He said the program, which was dormant for two years because of a loss of funding, also tracks national scamming trends and plans to use collected statistics to lobby for tighter state regulations.

Severson knows the fallout of a bad move. Her father's move to Jacksonville from Virginia after being diagnosed with brain cancer was stressful enough without the surprise they found when opening moving boxes. Many items were broken and others were missing, causing her father to sink into depression.

"My dad said for four months, 'I watched my whole life go out the front door,' " Severson said. She has done about seven moves since opening At Home Again Inc. a year ago and expects business to increase as the word of such services gets out.

Florida PropertyPros Inc. owner Sharon Franzen expects the industry to expand, but warns that it isn't a business for those who aren't willing to listen and even help customers with non-move-related tasks.

"If you are getting rich, you are doing something wrong," said Franzen, who charges \$1,200 to \$1,500 to move someone from an average-size home. Franzen, who works as a real estate broker like many senior move managers, also helps the non-elderly move. She manages the moves of about half of the deals she brokers.

Like Franzen and Severson, senior move manager Bobbie Gennaro puts a special focus on rearranging customers' new living space to resemble their former set-ups as closely as possible. Filling a scrapbook with photos of possessions that aren't kept is another way to help customers retain a sense of normalcy.

Christine Carona, 84, said her move from a one-bedroom apartment to a studio apartment was flawless, thanks to Gennaro, who co-owns Trusted Tranzitions with her husband, Rich Hollabaugh. Small acts of help -- such as helping Carona fill out her change of address card and buying her a door wreath as a housewarming gift -- went far.

"I felt a big load lifted," Carona said. "I can't praise them enough."

Moving specialists Moving Forward LLC help seniors feel at home when leaving home

Posted by Julie Edgar

Oakland Business Review May 15, 2008



LouAnne and Tim Audette of Moving Forward LLC, based in Highland.

Unearthing a bundle of wartime love letters or spotting nearly \$10,000 stuck to the bottom of a battered file cabinet are happy discoveries, but finding treasure isn't the reason their work is rewarding.

For Tim and LouAnne Audette of Moving Forward LLC, it's helping seniors make the smoothest possible transition from one home to another. The payoff is not just in healthy sales revenues but in the warm bonds they

form with clients.

The Highland Township couple, who launched the company in 2001 and run it from their home, are in the business of sorting, packing up, donating, disposing and unpacking at the other end.

Their clients are typically over 75 years old and are moving into an independent living facility like Fox Run or Henry Ford Village. A typical job takes two days and can cost between \$500 and \$5,500, depending on size.



"We help take away the physical and emotional stress of moving. It's pretty trying on seniors, a lot of whom have lost a spouse recently. We step in and do everything needed to get them ready to move," said Tim Audette, 59.

Before the Audettes started the company, Tim Audette (nephew of Frank Audette of Audette Cadillac in West Bloomfield) had been managing Brighton Honda for his sister. When she sold the dealership, he and LouAnne, an occupational therapist, began searching for a new venture, learning about a moving service for seniors in Philadelphia that they subsequently visited. In 2002, the couple helped to found the National Association of Senior Move Managers, which has since grown phenomenally.

Making Contact

For more information about Moving Forward LLC:

- Call (248) 889-3559
- Visit www.movingfwd.com

NASMM spokeswoman Jennifer Pickett said there were about 70 members in 2006; today there are 430 companies nationwide that serve the booming population of folks 65 and older.

Last year, Moving Forward was hired for 142 moves that accounted for \$250,000 in sales, a 20 percent increase from the previous year.

The Audettes opened a second branch of the company in Chicago in March.

The company employs 22 bonded staffers, most of them women with young children and retirees. Moving Forward has two vans and trailers to haul away junk and take things for consignment or donation, but it uses moving companies to handle big items like furniture.

Yes, there was the envelope stuffed with \$9,600 at the bottom of a cabinet destined for the Dumpster and the letters from World War II. Their owners were delighted at the discoveries.

"Because we're dealing with intimate parts of their lives and handling their most treasured things, we have to be the type of people someone can trust quickly," said LouAnne Audette, 54. "It's not like we have to send 5,000 Christmas cards to everybody, but at the end of the workday, everybody hugs each other."

In early April, the company moved George and Dorothea Peters, both 89, from their Bloomfield Hills home to Maple Village about a mile away. George Peters gushed that "LouAnne and her ladies came out and did an awesome job."

When the couple walked into their new apartment the next day, Peters said, it was like opening the door to a beautiful hotel suite.

Julie Edgar is a freelance writer.



***Downsizing your belongings
Services include culling, packing, liquidation of burdensome items
April 27, 2008
By: Leslie A. Pappas, The News Journal***

Elaine Glisson still doesn't know how she managed to squeeze the contents of a three-story, 2,600-square-foot town house into a 958-square-foot apartment. When Glisson, 73, decided to move into a retirement community in Sussex County last September, she had lived in her Pike Creek Valley home for 31 years. "I sold everything," said Glisson, a 15-year widow, who still remembers the frenzy to pare down a lifetime of stuff as "a last-minute, horrific thing." "I sold my silver. I sold my china. My knick-knacks. I gave away 30 bags of clothing."

For many Americans, the goal of life is moving up, fixing up, trading up. Bigger is better, more is good. But as Americans enter their senior years, many find that more becomes a burden. "You get to a certain stage in life, and all of a sudden this stuff is an anchor," says Diane Durban, owner of Brandywine Senior Transitions LLC, whom Glisson hired to help her through the downsizing process. "People want to shove a four-bedroom house into a two-bedroom apartment and it just doesn't work."

Durban is one of a growing number of professionals who help seniors like Glisson climb safely down off the Mountain of More. "I'm a change manager," says Durban, a retired Navy officer and former corporate project manager who now helps seniors sort, purge, sell, pack and move to more manageable digs. "I understand the cycle of change and what they're going through, and we make it as stress-free as possible."

In Glisson's case, Durban found the mover and real estate agent, mapped out the new floor plan on a computer to help Glisson decide which furniture to keep, staged the old house to sell, and made sure everything was unpacked and arranged in the new home -- down to the closets -- on the day of the move. "It was wonderful," Glisson said. "It's nice to have somebody help you. They don't have any connection with your things."

There's plenty of demand for such help, says Mary Kay Buysse, executive director of the National Association of Senior Move Managers (NASMM), and the need keeps growing. The U.S. population ages 65 and over will jump nearly 80 percent when the baby boom generation retires between 2010 and 2030, NASMM says. By 2030, seniors will account for one-fifth the U.S. population.

Yet families are more scattered than in the past. Two-income households leave adult children little time to help aging parents pack and move. Other seniors, widowed or without children, don't have much help, and are too overwhelmed to tackle the problem alone. Even when family help is available, emotions can run high, making the process difficult and upsetting for everyone involved.

"Outsourcing to a professional is the solution for many families," Buysse says. "It's a really growing field."



Established in 2002, the association has grown from about 70 members two years ago to 450 today, and last year moved about 15,000 seniors for about \$30 million in fees, Buysse says. Now real estate agents, professional organizers, and even retirement communities are adding senior move management to their list of services.

One Delaware pioneer in continuing care retirement communities, Peninsula United Methodist Homes (PUMH) Inc., added its "Transitions Made Easy" services in 2004 after realizing many would-be residents were reluctant to move in because the downsizing process itself was too daunting. "Sometimes we're not really marketing ourselves against our competitors," says Terri White, PUMH's vice president of operations. "Our most significant competitor is not leaving their home."

Since PUMH started the service in 2004, they have moved 316 families, White says. Seniors often benefit from the objective eye and willing ear, professionals say. "It's interesting the values that people will associate with things," says Susan Henderson, Transitions Made Easy's property disposition coordinator, who helps seniors decide what to keep, give away, sell, auction or toss.

Sometimes, she helps people let things go. "Part of the emotional process is listening to the story behind it [the object]," she says. "It's almost an emotional, cathartic process."

Other times, she convinces people to sell things for cash. She remembers one man, moving out of a home he had been in for 40 years, shoving collectible antique teddy bears into a garbage bag. She dug them out and suggested they sell them. "He just looked at us like, 'But it's trash!' " she recalls. "And the person who bought those was thrilled beyond belief."

Other times, people are disappointed to find their stuff has little value, says Susan Nilstoft, an industry veteran who plans to launch her own company, "Senior Home Selling Services" this summer. "People think, 'This is a solid wood dining room set.' And they think they'll get a lot of money for it," says Nilstoft. "But it's only worth what someone is willing to pay for it."

Some seniors, who want to get the job done quickly, will call a liquidator, who scoops up everything in the house and writes a lump-sum check. "We can really do a service of coming in, packing and taking it off their hands," says Diane Krapf, owner of the Annex Marketplace in Wilmington.

Krapf reclaims everything from high-end furniture to tools, then resells the discarded treasures in three-day sales twice a month. On Thursday, JoAnn Carello, 69, of Wilmington, perused a table of dollar knick-knacks at the Annex. "I should be downsizing but I'm not," Carello says. "I have a house full, but I always find something."

Glisson might advise Carello not to bother. Ensnconced in her new one-bedroom apartment in Cadbury at Lewes, Glisson says the only thing she misses from her old house is the garage. "Your treasures are not worth anything after you've bought them," she says. "I must admit, I don't miss any of it. It's almost a relief."

April 12, 2008

Business helps seniors move, downsize

BY CHRIS MORRIS

Chris.Morris@newsandtribune.com

Moving can be stressful, especially for senior citizens who have lived at a location for decades.

Many times, seniors downsize and don't have space to take everything they have accumulated through the years. And family members can sometimes add additional stress and strain to the situation.

That is when Mona Wagoner steps in.

Wagoner operates Smooth Transitions of Southern Indiana. Her business is designed to make moving and downsizing as stress free as possible.

"The job has been very rewarding," she said. "This is one of the fastest-growing businesses for women."

Started by Barbara Morris, Smooth Transitions has locations all over the country. It is certified by the National Association of Senior Move Managers.

Wagoner — whose business is located at 1600 Rector Lane in New Albany — said moving can be overwhelming for senior citizens. She said she can be objective, where other family members can not.

"Families appreciate objectivity," she said. "And it's rewarding for me.

"I work with the families and give them my recommendations. Then we decide where to donate the items we leave behind. We try to avoid dump sites. We want to keep it moving."

Nancy Cogan was unable to move her mother, due to illness, when she called Wagoner recently. The Louisville resident was in the process of moving her mother to a nursing home when she became sick. Wagoner stepped in and finished the move.

"We talked on the phone a few times but she took care of everything," Cogan said. "It was very traumatic, but she was perfect the way she handled everything. I was caught in a situation where I needed someone to pack."

Mary Kay Buysse, executive director of the National Association of Senior Move Managers, said the demand for more senior movers will increase as 76 million Baby Boomers prepare to retire.

“It’s a growing industry,” she said. “The senior move manager is an extra layer of emotional support. They move people, rather than boxes. They help them sort through a lifetime of memories.”

In two years, the business has grown from 80 move managers, to more than 450 across the country, Buysse said.

“It’s really a significant life change, and sometimes it takes someone from the outside to help with the process and ease the transition,” she said. “Most family members are probably two-income families and have all kinds of obligations with their children. There is just not enough time.”

Wagoner also said many times family members live out of town and are unable to help parents with the moving process. She said her business gives them “peace of mind.”

She also said many times tough decisions have to be made, such as to what to keep and what to leave behind. Wagoner said she also helps in the complete shutdown of an established home site and with finding a new home, apartment or condominium.

“She has a lot of contacts. We wanted to give the stuff to someone who needed it,” Cogan said.

For more information about the business or rates, contact Wagoner at 502-386-1025 or mona@movingforseniors.com.

ON THE WEB: www.movingforseniors.com

Daily Herald

Big Picture . Local Focus

A little help makes it easier to move, let go



By Jane Oppermann | Daily Herald Columnist
3/31/08

What's a person to do with all that stuff accumulated after living in the same home for 20, 30 or 40 years? And what about all those memories?

When Margaret Smith retired after 37 years as a kindergarten teacher in River Trails School District 26 in Mount Prospect and moved into a retirement complex, she discovered that she



didn't have to part with everything -- especially a few of the 300 teddy bears she had acquired over the years.

She learned she could document and share all those memories while cleaning out her downtown Arlington Heights condo, thanks to Christine Segin, a senior relocation specialist.

"By the time people have been in their homes many years -- one man lived 88 years in his home -- they've experienced quite a bit of loss, so people tend to hold on to their items," said Segin, owner of Moving Companion in Hoffman Estates. "Moving is stressful, but it can be manageable if you have some help."

Certainly sorting through years of your possessions, deciding what to keep and what to give away or discard, can be daunting. Indeed, the term "relocation stress syndrome" was recognized as an official diagnosis in 1992.

A study by researcher Susan K. Lutgendorf of the Department of Psychology at the University of Iowa, published in the *Annals of Behavioral Medicine*, showed that people who are moving report more illnesses. But folks who prepare in advance for a move and who have a sense of control in the relocation process feel less stressed or overwhelmed and have a better sense of well-being.

But what to do with those 300 teddy bears; an angel collection, including some passed down to Smith by her mother, and a beautifully crafted crazy quilt made by Smith's grandmother -- all beloved items packed with generations of memories? Whatever you do, you do it slowly and lovingly, said Segin.

"Margaret was smart. She knew her move wasn't going to be easy, so she prepared for it over a one-year period," Segin said. "She was attached to everything, so she wisely let go gradually, and I think had fun with the process."

Segin came in for several hours a day during this period to help Smith sort through her belongings. An old trunk filled with Smith's baby clothes and childhood toys took several days to go through and a walk-in closet brought another challenge, eventually providing piles of donations to charities.

Smith even recruited her eBay-savvy minister in the process. Sifting through old silver and china, the two sold enough items to reap a handsome donation to Smith's church.

"Christine and I would work in an area until it was finished. Somehow it wasn't threatening because I knew I had time," Smith said. "The thing is, somebody else was there helping me do this. Christine would listen while I would recall its story, and then I would either say, 'it's time to let go or I'll keep this'. She gave me the chance to remember."

Senior relocation specialists, also referred to as senior move managers, provide a fairly new service emerging to accommodate older adults who want to downsize or remain in their homes with less clutter and greater safety and comfort. The service helps develop an overall move or age-in-place plan; helps organize, sort and downsize; arranges for items to be auctioned, donated or sold in estate sales; schedules and oversees movers; arranges for shipments or storage, and helps unpack and set up the new home. The hourly fee for such services range nationally from \$45 to \$75. Midwest fees may range from \$50 to \$60.

"We move people rather than boxes. It isn't a moving company; it's an extra layer of comfort and trust. You have a partner in your move. But there is also another facet of this service -- helping clients age in place," said Mary Kay Buysse, executive director of suburban Chicago-based National Association of Senior Move Managers.

Smith began cleaning out her collections two years before her retirement. Though never married, she says she had many, many children -- her students -- and even more memories of teaching kindergarten for 37 years.

Those 300 teddy bears were collected over the years and used as a teaching tool for counting, sorting and storytelling. She ended up giving many to teaching colleagues, friends and relatives.



Today 10 very special bears remain. Nine, including her childhood bear, are snuggled in a basket near Smith's desk; her mother's bear from the early 1900s sits securely in an antique toy rocker in the living room.

And the prized quilt, once stored in a trunk, now is displayed proudly in her niece's home in Maine. With Segin's help, Smith photographed the quilt, documented its history and mailed it off to her niece.

Margaret Smith brought her most prized teddy bears with her when she moved into a retirement complex - and with the help of a senior relocation specialist, found good homes for the rest.

It's been almost one year since Smith moved into The Moorings of Arlington Heights. Today all her belongings fit neatly and comfortably into her two-bedroom apartment. Looking back on her yearlong moving adventure, she is grateful she did it gradually.

"Don't wait till you're under pressure to get rid of your things," Smith said. "I had the chance to say goodbye to them. I had the chance to pass along my really cherished things to people I loved and who I knew would cherish them, too."

To find a local senior relocation specialist, contact the suburban Chicago-based National Association of Senior Move Managers at (877) 606-2766 or www.nasmm.org, or the New



Jersey-based National Organization of Professional Organizers at (856) 380-6828 or www.napo.net.

The Oregonian

Clients place valuables, faith in movers' hands

Human relations - Take Care Move Assistance is about more than boxing stuff

Thursday, March 13, 2008

Holly Goodman

When Tad McCall's mother died at age 92 last November, the son of former Gov. Tom McCall was in a precarious position.

He didn't have time to take weeks away from his life in Virginia, 3,000 miles from Portland. And as Tom and Audrey McCall's only surviving child, nor did he have anyone else to do the delicate work of sorting, packing and distributing his mother's belongings.

McCall found reprieve and a solution with Take Care Move Assistance, a Lake Oswego-based professional move management company. He placed his faith, along with the whole of his mother's estate, in the hands of Take Care's owner, Bill Smith.

Smith is part of the rapidly growing National Association of Senior Move Managers. The Illinois-based organization has multiplied from 22 members at its inception in 2002 to more than 400 this year. Between 2007 and 2008, it grew by 30 percent, said executive director Mary Kay Buysse.

Members specialize in helping clients downsize, pack and move. Many undergo training in relocation and transition, though Buysse said the infant industry is still developing its standards.

Smith charges an hourly fee to his clients, most of whom aren't physically able and lack local family to handle the demands of moving. He provides packing materials and contracts with moving companies, real estate agents, estate sales companies and auction houses. He studies blueprints to help configure new homes, unpacks and disposes of packing materials.

But sorting, boxing, moving and disturbing other people's stuff -- the physical work -- is just a small part of the job. The art is human relations.



"Really what I'm finding is, I have to establish trust in our relationship," Smith said.

"The hardest part is the psychology of it," he said. "In getting (clients) to face the reality of what they are up against, I try to stay upbeat, let them know what a good thing it is for them that they are giving something away. How much someone is going to appreciate it."

Smith had had a lengthy career in project management and was working for the state in December 2006 when he came across a news article that mentioned senior move management. Three months later, he gave notice at work and began acquiring a general contractor's license, an Oregon Department of Transportation pack and load permit, liability insurance and a fidelity bond, a form of business insurance.

Now many of those licenses and qualifications are available through MoveSeniors.com, a new organization that offers three-day certification training for \$1,995, including a one-year National Association of Senior Move Managers membership.

For McCall, Smith was a godsend.

When Audrey McCall died, her son was juggling environmental consulting work, an 11-year-old son, the upcoming holidays and a home remodel.

He was ready to pay any price for help. He hired Smith, signed a check and let Take Care do the rest.

"It saved me a lot of time," McCall said. "He saved me time, he saved me money and he dealt with solving the problems as they arose."

Finding the fast track to a new beginning

Saturday, March 01, 2008

By Kelly A. Shue

THE ERICKSON TRIBUNE

In an exclusive partnership with [Riderwood](#), the area's leader in downsizing and senior move management—Transitional Assistance & Design—works with future community members to make their moves seamless and stress-free.

Expert assistance

Real-life experience is the name of the game when it comes to Transitional Assistance & Design. Owner Susan "Susie" Danick began the company eight years ago after helping her grandmother move to a retirement community.

“We work with future residents to create a full-service moving plan, providing all the support they need—hiring movers, transferring utilities, packing, unpacking, and setting up the new apartment so that they can begin experiencing that life can be like at Riderwood right away,” says business partner Joel Danick. “It is our mission to turn the once-dreaded chore of moving into a positive experience.”

Satisfying individual needs

Meeting the needs of community members is a driving force behind the philosophy of all Erickson communities, beginning the moment an individual makes the decision to move. Riderwood’s partnership with Transitional Assistance & Design began from this vision.

“Almost two years ago, we met with John Erickson to discuss our company’s mission, vision, and service solutions,” says Joel Danick. “He felt that Erickson had to reach beyond just welcoming new residents when they arrived at the new community by reaching out in advance to help support their moving process and create a smooth transition.”

How it works

Once an individual has made the commitment to move to a new home at Riderwood, he or she is contacted by the Danicks. After explaining their services, they arrange a free one-hour consultation with the client. Riderwood currently provides each new resident with 12 free hours of service that can be used toward any of Transitional Assistance & Design’s move-in and settlement services.



If desired, future residents can add services as needed over and above the 12 hours depending on the support they need. “Each person has varying needs so we are able to establish those and customize individual strategies when we meet during the initial free consultation,” says Joel Danick.

Friends for the future

By removing the notorious hassles of the moving process, Transitional Assistance & Design helps residents enjoy the Riderwood lifestyle as soon as possible. As members of the National Association of Senior Move Managers, the Danicks have the contacts and experience needed to ensure a seamless and stress-free move.

“Our greatest satisfaction comes from working directly with the residents and getting to know them personally,” Joel Danick says. “While we begin our relationships with the residents as clients, we end each one of them as friends. Our business is a very personal one, and we love the opportunity to share each of their life experiences and learn and grow from each relationship.”



Sunrise Offerings for Independent Seniors: Sunrise by Summer February 11, 2008

No doubt about it. The advantages of joining a Sunrise independent living community are compelling. No longer will you have to worry about home maintenance or writing checks for such items as homeowners insurance, landscaping service, or housecleaning. If the grass gets long, that's someone else's worry. Even more important, you have more time—time to spend



with like-minded seniors, to volunteer with local charitable groups, to cultivate new interests, and, if you so desire, to curl up with a book.

But even though they are drawn to these advantages, many seniors hesitate to make the move. Quite naturally, there is the pull of familiar surroundings holding them in place as well as the task of putting their house on the market and packing up their belongings.

You would be surprised to learn, however, how easily these difficulties can be overcome with a little planning—and some professional help. Here are some suggestions about staging the moving process:

- **Dealing with real estate.** For most people, a house is their largest single asset—and the hope is to maximize the return on it. With the housing market slowing, many homeowners are hesitant to put a for sale sign on their front lawn. If you've been in your house for a long time and built up substantial equity, you might consider that this year's prices are not all that different from what they were two years ago—and two years ago they seemed very attractive. If you decide to sell, work with your realtor to price your house realistically.
- **Deciding about your belongings.** Go through your house systematically over the period of a few weeks with a friend or family member and make decisions about your possessions. Some you'll take with you, some you'll throw out, some you'll sell, and others you'll give away. Sometimes all it takes is the opportunity to reminisce about an object to release its grasp. There are also experienced consultants who can help you decide which furniture you should take to a new home, organize a garage sale, and choose a mover.

Our possessions, more than our memories, can consign us to living in the past. When our possessions prevent us from living life to the fullest, it's time to downsize. Start now, and you'll be able to move to Sunrise by summer. For assistance in downsizing, consult the National Association of Senior Move Managers.



A Smooth Start
by Drew Ermenc
January 28, 2008

Entrepreneurs call it the “light bulb moment;” a point in time where the idea for their million dollar concept hits them like a ton of bricks. For Adrienne Simpson, her enterprising flash came while helping her mother’s aging friends relocate to smaller homes and retirement communities, a process that originally started with her mother’s need for help during her move to Michigan. “I did it for about a year as a volunteer for my mother’s friends,” Simpson recalls. “There was this ‘ah ha’ moment after a number of seniors were calling and saying ‘I need help.’ I thought, ‘there must be a need for this service.’” And thus, out of perceiving a need in the marketplace, Simpson’s idea soon became a reality.

In 2002, Simpson started Smooth Mooove Senior Relocation Services by borrowing from her credit cards, a risk she was willing to take to see her business off the ground. “It was very nerve wracking, but I knew there wasn’t anyone that was going to give me a loan because I was going into a industry that I didn’t have experience in,” she says.

But she was confident in her abilities and her idea. “If I can run a corporation, I can certainly come up with a business of my own ...” she says. “As I reviewed my career, seniors were always my favorite customers. But I wanted to do something that no one else was doing. I knew who my customer was going to be, and it took moving my mother to find out what the service was going to be. She definitely showed me all the facets associated with it. She’s a mom. She expected me to do the packing, sorting, moving, all the things that she needed.”



So what’s the difference between her cow-loving company, located in Stone Mountain, and other competing moving agencies? “Other movers move things, I move people,” she explains. “The difference is 90 percent of the time, when a senior moves, there are in crisis. Whether it’s losing a spouse or their health is failing, when they call, they don’t say ‘I need to move in three weeks’, they say ‘I need to move tomorrow.’”



After working in corporate America for three decades, most recently as the director of operations for a large insurance company, Adrianna Simpson knew customer service was critical to the success of her small business. Included in Smooth Move's plans are options to set up the senior's bathrooms, hang drapes, medical equipment installation and a total unpacking of all boxes. "Someone from the crew will keep an eye on the senior if there's no family," she says. "We have a luxury van. We will transport the senior and their pet if they don't have a way. We load the truck, bag up the trash, sweep out the garage. We are their family; whatever they would ask their family to do, we will do it."

Now in her sixth year, Simpson has grown substantially since her first customer, earning just over a half a million dollars in revenue last year. And she has plans to franchise the concept, possibly as early as the end of 2008. "Because of the Web site and the national attention, inquiries [for franchise opportunities] are coming from all over the nation and the world: Japan, Africa."

And the bovine theme? "When I decided to have a moving company, I went to the state to register the name as Smooth Move," she recalls. "Not knowing that every mover in the world wants to be called Smooth Move, the name was already taken. Disappointed, I was talking with my graphic designer sister-in-law, who was creating my logo. She suggested I put a few extra 'oo's' in move and see what happens. I did and was able to register the name. She then said, 'You know since you have all the 'oo's' in move you must have a cow in the logo.' So she designed a logo with a cow."

"It wasn't planned, as none of the business was, just a wonderful accident," she says. "It's been lot's of fun playing on the cow and all the corny puns we can come up with. I have the cow on my trucks and the clients love it."

Although she has less free time than her days as a corporate exec, she loves owning her own business. "I saw a need," she says. "I'm a control freak; that came from corporate America all those years. I wanted to be able to have the outcomes that I wanted. I didn't want to work with six different companies and not be able to manage my results. And I wanted to give seniors the same level of care that I was able to give my mother."

The **R**ecord.com

January 23, 2008

Chuck Howitt, Record Staff

Looking after the details

Kitchener firm does the organizing for seniors who are downsizing and getting ready to relocate

Last summer Dorothy Sheppard faced a dilemma.

She and her sister owned separate condos in Kitchener and Waterloo. But with Dorothy in her late 80s and her sister in her early 90s, it was getting tougher to make meals and get around.

They decided to move into a three-bedroom apartment in a seniors building in Waterloo where meals could be prepared for them and they could help each other with the daily activities of life.

But the thought of moving scared Sheppard in a big way. She had no children to help and her sister had only one son, who lived out of town.

"We were up the creek," Sheppard says.

Then the owner of Waterloo Heights, the building they were moving to, passed on a brochure describing a local firm that helps elderly people relocate.



Enter Brynn Varey, owner of Kitchener-based Senior's Move.

Varey helped Sheppard and her sister organize their belongings so they could decide what to keep and what to get rid of. She also arranged for auctioneers to sell valuable but unwanted items and hired a moving company to handle the move itself.

"On moving day, she told us to disappear," Sheppard says.

The sisters went to their new apartment at about 3 p.m. Their furniture was arranged the way they wanted because of a floor plan Varey had drawn up. And "by five o'clock even the beds were made."

Varey came back the next day to unpack more boxes and returned a week later to take away items the sisters had decided they didn't need.

"Brynn was a wonderful help. We could never have done it ourselves," Sheppard says.

Senior's Move is filling an emerging market niche, helping both seniors and busy adults with elderly parents who don't want to go through the hassle of downsizing and hiring moving companies themselves.

GROWING MARKET



While this market is just starting to grow in Ontario, it is taking off in the United States, where the National Association of Senior Move Managers was created six years ago. Membership has grown to 400 firms today, from just 70 only 18 months ago.

"Older clients really need that little extra layer of support where the moving companies leave off," says Mary Kay Buysse, executive director of the association.

She stresses that seniors-move managers or consultants try to work in harmony with moving companies.

"It's a collaborative relationship rather than adversarial."

Varey, 26, had no previous experience in the moving industry when she formed her company three years ago.

But her mother had worked with the aged as a contractor finding social workers for long-term care facilities.

A marketing graduate from Conestoga College in Kitchener, Varey has a bachelor of commerce degree in entrepreneurial management from Royal Roads University in Victoria, B.C.

On returning to Kitchener, she took a job as a market analyst with an advertising agency in Cambridge, but hoped to start her own company.

When a friend mentioned a company in North Carolina that helped seniors move, she was intrigued and phoned the woman who ran the company. Because Varey wasn't going to be a competitor in the same geographic area, the owner was willing to share advice.

After doing some research to test the feasibility of her idea, Varey launched Senior's Move in 2005, but kept her part-time marketing job in case things didn't work out.

But youth, enthusiasm and an eagerness to learn were on her side, she says.

"I was just so excited to take advantage of this new business opportunity."

SPECIAL SKILLS

Helping seniors relocate requires a special set of skills, Varey says.

"How do you deal with someone who is a hoarder? How do you deal with someone at a time of loss (of a loved one)? How do you deal with someone who has dementia?"



Despite these challenges, she found early on that most of her clients were healthy seniors, or adults with aging parents who didn't have the time or the energy to supervise a move.

To keep costs down, she worked out of her home, using boxes she picked up for free from liquor and grocery stores. She stored them in her garage.

Every move is different, Varey says. "There is no strict regimen."

Though she will help clients decide what to keep or discard, she has found that most want to "take care of the downsizing themselves."

So most often she does the packing, lines up the moving company, supervises the move and unpacks.

"I tell them, "Let me do the dirty work."

When it came to dealing with moving companies, she learned by trial and error. It wasn't long before she was able to compile a short list of firms she wanted to work with.

"It's a great advantage for (moving) companies to work well with me."

At times, she has had to work quickly. She once got a call from someone who had three days to get their mother into a long-term care facility.

The customer said: "Just take the necessities out of mom's house. I'll take care of the rest."

Most Senior's Move clients are couples or widows in the 70 to 90 age range.

"The women are outlasting the men," Varey says.

Depending on the job, she has charged anywhere from \$300 to \$4,000 to handle a move. Her longest job took 50 hours.

For Sheppard, it was money well spent.

"I found them (Varey's rates) not to be excessive for the work that she did."

Varey estimates she has helped with about 200 moves since starting out and says the company is profitable.

Last year she moved the business to an office located in the Trinity Village retirement complex on Kingsway Drive in Kitchener, which she shares with her mother, Mary Varey, and a partner Jena Winterburn.



The three run a company called Age-Wise Solutions, which provides a range of elder-care services. Senior's Move is a division of Age-Wise Solutions.

SENIOR'S MOVE,

www.agewise.ca

Address: Suite 322, Trinity Village Care Centre, 2711 Kingsway Dr., Kitchener, N2C 2T2

Founded: 2005

Employees: 3