

The Legacy Years Guide to Downsizing Your Home



Transition Services

By

Harriet Vaughan

Foreword

Dear Reader,

This workbook is designed with the intention of helping you begin the process of going through the accumulations of your possessions, so that you may work thoughtfully and at a leisurely pace. Sometimes a home is full of things that have been accumulating for decades, representing memories and emotions that are both good and bad.

The intent is to help you make an Action Plan, because if you wait too long:

- Control will be taken away from you by circumstances – a fall, an illness, senility, etc.
- The decision-making will land on people who are already stressed out and who may have to act hastily, maybe choosing a dumpster as the easiest way to deal with a crisis situation!

So please let this guide lead you to making decisions and taking action.

I hope that you will find it useful.

Sincerely,

Harriet Vaughan

Introduction

The term "legacy years" is one I created for myself when I turned 60. I definitely did not consider myself "elderly," yet my children were moving into the age range that is considered "middle age." So, I decided to cede middle age to them and decided that I am in my legacy years. 60 is not the new 40, but our legacy years can last as long as we do. This is the time to take stock of our lives and make adjustments. Now we can make the most of the time we have left by disencumbering ourselves from the "stuff" that locks us in the past such as:

- Uncompleted projects
- Unfulfilled potential, e.g., that degree you were going to get
- "Ancestor worship" through hanging on to inherited trinkets
- Kids' stuff that they never moved out of your house

It's about staying mindful of time – we don't have forever. Really.

- We need to devote daily time to maintaining the strength and flexibility of our bodies.
- We need to build in time for rest and recovery after exertion, unlike when we were 20 and could burn the candle at both ends.
- We need to become aware of our ratio of activity-to-restoration in order to maintain balance in our lives.

The Legacy Years Program is about giving ourselves permission to get rid of the things we've held onto as obligations to the past or to future generations, choosing instead to live fully and productively in the present.

What is a legacy?

Types of legacies:

- a) The fantasy – Do you remember a television show from the 1950s called "The Millionaire"? At the start of each program an ordinary citizen would answer a knock on the door to find a distinguished-looking stranger standing there, whose job it was to announce that a wealthy man "who wished to remain anonymous" wanted to bestow a million dollars on this lucky soul. Wow! Instant legacy! Variations include winning the lottery or other dreams about "when my ship comes in."
- b) The legacy around you – Suppose, instead, you looked around at everything you possess and viewed it all as a legacy. Some of the things in your home were inherited from family members who wanted you to have them. They may have a rich history and be full of meaning for you. And other things were earned by you through many years of hard work.
- c) The legacy within you – Or consider this: **You** are the Legacy. Who you are today is the product of actions taken and things received and earned over a long life. Your history and life experience is something you can impart to future generations.

Don't let your history—your legacy—get thrown out as garbage because no one understood who you were, what your things represented, or what you wanted to be done with them.

Exercise:

Who might you leave a legacy to? This doesn't necessarily mean monetary wealth. Consider the following:

- **Your children:** specific items handed down through the generations, family photos, scrapbooks, journals, etc.
- **Your grandchildren:** their history...where they come from, who was in their genealogy
- **Other family:** family photos, letters
- **Your community:**
 - Historical societies: photos of the town where you grew up, event schedules, yearbooks
 - Homeless shelters: extra household items, blankets, towels, furniture
 - Library: books, movies
 - Schools: craft materials

As you sort through your house full of things, consider how any of them could be a legacy to one or more of the people or organizations listed above.

What is different about organizing when you are 60 or over?

- You have probably accumulated more things. You may feel overwhelmed by the prospect of dealing with your many possessions.
- The task may be forced on you by a big life transition such as the death of a spouse or a change in your own health.
- Your home may be aging at a faster pace than you are and you can no longer manage the upkeep.
- You need to balance your expenditure of energy with sufficient time to recover. Dealing with your possessions can be emotional, which can drain your energy further.
- Arthritis or other mobility problems may limit what you can do by yourself.

Still, it is better that you be the one making the decisions rather than having control taken from you.

Organizing the things in your home

There are three areas of organizing which you might attempt:

- **Objects/things** – in general, anything that is three-dimensional but sometimes the distinction is not clear, such as a photograph. A photo in a frame or album is an object but loose photos are data.
- **Data** – data is paper and loose photos, but can also represent time, such as a reminder card for an upcoming doctor appointment
- **Time** – this can be the hardest to organize because it can't be seen or held other than as a calendar or a clock...but it still can be organized

There are three organizing activities:

- **Reducing** – getting rid of things
- **Arranging** – assigning space for the things you do keep
- **Maintaining** – knowing where to find an item when you want it again

The challenge comes with deciding where to begin!

Seasonal Organizing:

Spring (before the hot humid weather, blackflies and mosquitoes set in) and Fall (after the growing season) are both ideal times to clean out storage buildings and attics where things have been allowed to accumulate.

Helpful gear for tackling your seasonal organizing project:

1. Wasp and hornet spray for outdoor buildings and attics
2. Dust masks...you're bound to stir up dust
3. Latex or nitrile gloves to protect your hands (and keep you from flinging the thing in your hand when you encounter a spider web or unexpected furry object)
4. Back supporter to strap around your waist
5. Step ladder
6. Knee protectors or a cushion to kneel on
7. Construction-quality black plastic bags, paper bags or large clear plastic bags*
8. A timer to help you get going – or quit before you overdo it
9. Paper shredder
10. Cardboard boxes to sort into*

*Important...try to make distinctions between the bags or boxes you use so that things you want to donate or keep don't get scooped up and sent off to the dump! **Tip:** Use black plastic bags only for trash and large, clear bags for "keepers" or donations. Or use cardboard boxes but label them with markers or index cards, e.g., "yard sale," "thrift shop," "library book sale."

Monthly Organizing with Themes:

- January = New Year's Day: It's the year-end wrap-up; can you locate the papers you need for your tax records?
- February = Presidents' Day: Tackle your books and magazines. How many can you part with? Who might take them? Can you resell any?
- March = St. Patrick's Day: Time to clean out the closet. For each item, ask: Does it fit you? Does it flatter you?
- April = Easter: Clean out your files and deal with information overload. What is the worst thing that could happen if you discarded this paper?
- May = Mother's Day: When family members call or visit, ask them to identify items they want, take items that belong to them, identify family photos or start a scrapbook project; get permission to discard items such as childhood photos, report cards, etc.
- June = Fathers Day: Round up lawn and garden items. Decide how many to keep.
- July = Fourth of July: Go through canning jars and storage containers decide how many to keep.
- August = Vacation time: If your family visits, consult with them about whether they want things in your home (see Mother's Day).
- September = Labor Day: Go through your out of season clothes storage. Decide what still fits and is in good condition. Can any be sold in a consignment shop? Consider donating clothing your local theater group could use as costumes.
- October= Columbus Day: Sort out your Christmas holiday decorations. Which ones are keepers? Will you distribute any special ones to your children or grandchildren? What needs replacing? Can you give away or throw out anything?
- November = Thanksgiving: Check your cooking supplies, cookbooks and recipes. How many do you actually use? Do any family members want what you don't want to keep?

- December =Christmas: Wrapping paper and other gift supplies - how much do you save and reuse? How many gift bags have you accumulated?

Organizing the Time to Work on Your Home

The "Day of the Week" system

The following is a system I created for myself to use. It *isn't* meant to dictate that you organize every single day of the week, but instead is a way of picking up an activity when you have the time and the energy and want a place to start – without too much thinking about it. (This is useful for breaking a big job into smaller chunks of time.)

The way it works is to assign a room or an area in your house to a particular day of the week. Then chunk up all the big, overwhelming tasks into smaller ones. For instance, if you decide you want to do some organizing on Sundays, and you assign the living room as being the area for that day, you might take on the china closet a place to start. For example, you could take everything off the shelves – one shelf at a time – and think about why you have each item. Does it have a story to tell? Do your children or grandchildren know about it?

This approach allows you to make several small passes at each room rather than one long session, which may be too fatiguing and lead you to throw stuff out rather than deal with it.

Suggestion: Use a calendar you already have and set up a schedule that breaks each task into small bits that you can do in a short amount of time. That way you can pace yourself to keep up your energy and interest. Remember, it took years to accumulate all this stuff. Don't expect to deal with it in one day.

Sample calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Living room	Kitchen	Hallway	Bedroom 1	Bedroom 2	Cellar	Attic
China closet	Pantry storage	Closet shelf	Dresser drawer	Blanket chest	Canning jars	Old trunk

Organizing data in your home

I use the term "data" instead of paperwork here to include things like loose photos. As I mentioned earlier, framed photos or photo albums are objects, but loose photos are data.

Some data you'll want to locate and find a permanent home for are your "vital records such as:

- Birth certificates and adoption records
- Marriage and name-change records
- Citizenship documents
- Military records
- Passport
- Death certificate (until estate is settled)
- Mortgages, deeds, titles and liens
- Records of investments, pensions and earnings
- Insurance policies

- Wills, living wills, powers of attorney, health care directives

This list is not meant to be a definitive guide, but just an aid to help keep you conscious of what you might throw out when it needed to be saved.

Consider the importance of knowing where these documents are if you need to be evacuated from your home suddenly in an emergency, such as a forest fire or chemical spill, and then need to prove your identity in order to return to your home.

Some books recommend you keep copies at home and originals in a safe deposit box; some recommend a fire-proof box or a home safe; some recommend a "grab-and-go" container that you can find quickly when needed.

The 80/20 rule

This rule is also known as the "Pareto Principle" and can be applied to many areas of life. For example:

- 80% of the papers you file you'll never refer to again
- 80% of the meals you create come from 20% of the recipes you've saved

It is just useful to show that **we keep more stuff than we'll ever use**. Nevertheless, if the stuff you are keeping isn't a problem for you or anyone else and you have the room for it, don't obsess over it.

But consider if any of these reasons for organizing apply to you:

- You want to spare your loved ones from dealing with a mess
- You want to be able to find something in the future
- You want to be a blessing in someone else's life by supplying them with things you no longer want to keep. For instance,

nursing homes like to have small doodads for prizes for bingo games.

Words to organize by:

- Be kind to yourself. Everyone who has made it to Senior Citizen-hood has made mistakes and has lots of regrets.
- As you come across items that bring up memories of these past mistakes, don't beat yourself up mentally or replay the voices of people in the past who did it for you.
- Your new mantra is "No Shame, No Blame"- things just are what they are.
- Have fun with this. Poke fun at yourself, making a game out of finding things that have no purpose or explanation. Say: "It seemed like a good idea at the time."

Emotional first aid

Here are some suggestions for dealing with some of the emotions that may come up as you're handling possessions of yours or others:

- Grieve. It is natural to grieve over losses we encounter as we age. We might mourn for changes in our status: retiring from the workforce, having an empty nest, changes in our health or finances. If you have lost a spouse or a child, resist the well-meaning advice of those who think you should act sooner rather than later to dispose of their possessions. You need time to grieve. Even when there has not been a death, saying goodbye to the things you're not going to keep still feels like a loss. Sometimes choosing a very personal charity for these items helps with the sense of loss.
- Create a "shrine." These are smaller, commemorative, representations of larger collections, such as a table or

shelf with photos, books or other items that summarize a career or a person. A memory box or scrapbook is another type of a shrine.

- Take photographs of the house and the rooms of the house as a way of keeping the memory or saying goodbye to a home.
- Be a match-maker. Find new homes for treasured goods in order to retain their legacy and special meaning. For instance, if your loved one was in the military, perhaps you could donate specific items to veterans' homes or organizations.
- Tell your stories. Talking with someone or writing about the special meaning of an object or a special person helps to relinquish and move on.
- Enlist a "body double." Sometimes having another person working with you helps you to focus, even if the person isn't actively doing anything more than asking, "What would you like to do with this?" There is something energizing about having a person committed to the same purpose. Sometimes you become more focused and decisive when you have another person working with you. Caution: Some people aren't suitable for this task, and will drain your energy rather than give you energy.

Problem solvers

Not everyone is good at providing emotional support, but there are a whole other set of people who can step in and take action, and we need them just as much. They are invaluable for tasks such as:

- Appealing to logic and questioning irrational beliefs, by asking, "What's the worst thing that might happen if you got rid of this?" or "What *if* that were to happen?"

- Asking leading questions that reveal the pros and cons of the situation
- Seek information:
 - ✓ Call appraisers – ask if they do "walk-throughs," or, take an individual item to be appraised.
 - ✓ Where can waste be hauled? Who picks up trash?
 - ✓ How must hazardous waste be handled?
 - ✓ Who buys house contents?
 - ✓ Who takes donations? Do they pick them up?
 - ✓ How can we determine the value of a donation for tax purposes?
- Keep people focused on their current life tasks and projects and not go overboard on reconciling the past.
- Help a relative or friend make an action plan - and stick with it!

Recommended Books

ADD-Friendly Ways to Organize Your Life by Judith Kolberg & Kathleen Nadeau, Ph.D (2002) Brunner-Routledge, New York

Rightsizing Your Life by Ciji Ware, (2007) Springboard Press, New York Boston

Sell, Keep or Toss? By Harry L. Rinker (2007) House of Collectibles New York

The Settlement Game by Angie Epting Morris (2006) Voyages Press, Inc. Big Canoe, GA

The Boomer Burden by Julie Hall (2007) Thomas Nelson Nashville

It's All Too Much – An Easy Plan For Living a Richer Life With Less Stuff by Peter Walsh (2007) Free Press New York

Don't Toss My Memories in the Trash- a Step-by-Step Guide to Helping Seniors Downsize, Organize, and Move by Vickie Dellaquila Mountain Publishing

Scaling Down – Living Large in a Smaller Space by Judi Culbertson and Marj Decker (2005) Rodale Press

Making Peace With the Things in Your Life – Why Your Papers, Books, Clothes, and Other Possessions Keep Overwhelming You – and What to Do About It by Cindy Glovinsky, M.S.W., A.C.S.W. (2002) St. Martin's Press



Harriet Vaughan is a graduate of the University of Maine with a B.S. degree in Home Economics. She has a passion for helping people plan ahead for what will become of their possessions. In her teaching and writing, she attempts to show people that the stories associated with the possessions, as well as the possessions themselves, can be a legacy for the family as well as for historical organizations. She believes that Senior Citizens should take leadership in their families and make decisions regarding the distribution of their personal possessions and thereby avoid the heartache, distress, and, sometimes, legal actions that split families apart. She writes a blog called [The Aging Coach](#)