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A Comprehensive Checklist for Moving to Assisted Living

The move to assisted living can be daunting, given the degree of planning required and number of details to manage. It's normal to feel in over your head. However, you can make the move far less intimidating when you approach it with the proper resources and support.

If you or your loved one have decided on an assisted living community, you've already taken a major step. The next phase of the [transition](#) is to plan for and carry out the move.

The best way to approach a move to assisted living is by breaking things down into steps. We've compiled multiple checklists of tips for moving to assisted living, broken down by category. Click the list items or scroll further down in this article for more information about each tip.

Assisted Living Moving Checklist

Planning for Healthcare Needs

- Make an appointment with your existing primary care physician.
- If you're moving to a new geographical area, find a new primary care doctor.
- Get your medications in order.
- Plan for other health and medical needs.

Finding the Right Moving Company

- Ask your community for moving company recommendations.
- Get cost estimates.
- Read online reviews.
- Make sure the company you choose is available on your move-in date.
- Make sure your moving company is properly licensed and insured.



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- If needed, make sure your company is able to move heavy and specialty items.

Packing Tips

- Consider hiring a senior living moving specialist.
- Prioritize the most important items.
- Clearly label furniture that needs to be moved.
- Store family heirlooms and expensive jewelry in a safe place.

Logistical Items

- Set up mail forwarding with the US Postal Service.
- Plan to cancel current utility services.
- Inform all necessary parties about your loved one's change of address.
- Add your loved one's schedule and community contact information to your devices.
- Plan end of life details.

"The Week Of" Moving Checklist

- Confirm with your community that all paperwork has been signed and received.
- Figure out your loved one's new contact information.
- Make sure your loved one has an emergency pendant.
- If applicable, ask your community for gate codes so that both family and the moving company can gain access.

Below is more information about each tip for moving a parent or loved one into assisted living.



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Planning for Healthcare Needs

It is important to make sure there is continuity in your loved one's healthcare after they move. Here are the steps you should take to make this happen.

- **Make an appointment with your existing primary care physician.** Once you've signed a contract with an assisted living community, one of the first things you should do is pay a visit to your primary care physician. Use this opportunity to get a physical checkup, obtain copies of your up-to-date medical records, and speak with your doctor about your upcoming move. Bring any paperwork that your community needs filled out and signed by a doctor. This should include an updated medication list with directions.
- **If you're moving to a new geographical area, find a new primary care doctor.** If your assisted living community is not nearby, your current doctor may be able to provide a referral to someone in your new area. There are also plentiful resources online, such as [this tool](#) from Medicare.gov. To avoid a delay in receiving medical care, make sure to plan appointments and follow up to confirm dates before your move.
- **Get your medications in order.** First and foremost, check with your community to see if they accept bottled medication. If this is the case, you will fill your loved one's prescriptions ahead of time and provide them to the community nursing staff upon move-in. If they do not accept bottled medication, it likely means you will be going through your community's pharmacy. In this case, the forms your doctor fills out will include prescription information, and your community will work with their pharmacy to get the medications to your loved one. Through medication management, all of your loved one's prescriptions will be administered by the nursing staff on the required schedule.
- **Plan for other health and medical needs.** Make sure to find specialists such as eye doctors, back specialists, dentists or anyone else you'll need to see in your new area.



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Finding the Right Moving Company

These are our recommendations for choosing a moving company for an assisted living move.

- **Ask your community for moving company recommendations.** Since they are managing residents moving in all the time, your assisted living community likely has a list of moving companies in the area. Some of these companies may even have specialty experience with assisted living and senior living moves.
- **Get cost estimates.** Make sure to understand the full scope of each moving company's contract—what is included and what costs extra. Budgeting is an important part of the assisted living move, so you'll want to make sure you have your moving company expenses in order.
- **Read online reviews.** One of the best ways to determine the quality of a moving company, or any company for that matter, is to read their online reviews. You'll be able to hear from real customers and their experiences and see if the company is right for you.
- **Make sure the company you choose is available on your move-in date.** Confirm that whichever moving company you choose is available on your planned move-in date. You don't want to get to the late stages of your move and find that all the company's trucks are booked on the day you need them.
- **Make sure your moving company is properly licensed and insured.** The moving company you choose should have proper licensing and insurance in both the state you are moving from and, if applicable, the state you are moving to. To avoid any hiccups, this should be one of the first details you ask about when choosing your moving company.
- **If needed, make sure your company is able to move heavy and specialty items.** If you have very heavy furniture or a hospital bed, it is important to make sure it is something the company is capable of moving. These types of items generally take special expertise and care to move.



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Packing Tips

Packing is one of the most important steps in planning the assisted living move. Approaching it in an efficient and organized manner can help alleviate a lot of the stress of moving and make the process less overwhelming.

- **Consider hiring a senior living moving specialist.** Senior living moving specialists can help with the entire move from start to finish. They will look at your loved one's existing home, review measurements of their new living space, and assist in deciding what should be brought and what should be left. For things that won't be brought to the new community, they can help set up an estate sale or donations as well as find long-term storage. Other areas they'll assist in include hiring and coordinating with the moving company, packing and unpacking, and staging the new apartment. While hiring one of these specialists can be pricey, the stress they remove from the moving process is well worth it for many families.
- **Prioritize the most important items.** Essential items like toiletries, medication, clothing, bedding and furniture should come first. Then move on to things your loved one will be using regularly, like books, movies, knitting sets or any other forms of entertainment. If their new room comes with a kitchen, pack a few pots, pans and dishes, but don't overdo it. Keep in mind the size of your loved one's new living space and plan accordingly.
- **Clearly label furniture that needs to be moved.** Mark your loved one's furniture with labels designating what needs to be moved, what should be put in storage, what should be sold or donated, and what should be thrown away. This will make things easier for your own organizational purposes as well as for the moving company.
- **Store family heirlooms and expensive jewelry in a safe place.** Rather than risk your loved one losing expensive items, store them in a safe place at home or a safety deposit box. You may be able to find cheap duplicates of any sentimental items that your loved one will want to keep on their person, such as wedding rings.



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Logistical Items

When planning a move to assisted living, the details matter. These are the top logistical items you should be taking care of before your loved one's move.

- **Set up mail forwarding with the US Postal Service.** You can easily set up mail forwarding to your loved one's new address using the USPS's [online tool](#). If your community can collect mail before the move-in date, set your mail forwarding to begin a week or so ahead of the move. Arrange with the community's front desk or concierge to hold your mail or packages till day of move in. This will ensure nothing gets missed in the transition.
- **Plan to cancel current utility services.** Contact the utility companies for your loved one's old home and schedule a cancellation for right after they move. Most assisted living communities have utilities included, but if not, make a plan to transfer utilities services to your loved one's new community.
- **Inform all necessary parties about your loved one's change of address.** Make a list of all people or companies that have your loved one's old address on file, and then contact them one by one to provide their updated community address. Examples include any creditors, insurance companies, healthcare providers, lawyers, financial services, subscription services, shopping websites and the Social Security Administration.
- **Add your loved one's schedule and community contact information to your devices.** Program your calendar with events like laundry days, housekeeping, hair salon days, social activities, wellness classes, and anything else going on at the community. This will help you know what your loved one is doing from day to day and help you feel connected. Make sure to save community contacts to your phone as well. That way, nursing staff, wellness staff, maintenance, and the concierge team will be just a quick call away.
- **Plan end of life details.** While it may not be pleasant to think about, it's important to plan end of life details such as estate planning, living will, DNR orders (which must be signed by a doctor), and power of attorney designation. Make sure to provide your community a copy of this information as well.



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“The Week Of” Moving Checklist

While we don't recommend doing anything at the last minute, below are some items you don't have to take care of too far ahead of time. We recommend checking these items off your list within a week of your move-in date.

- **Confirm with the community that all paperwork has been signed and received.** By this point, you should have filled out and submitted all pre-move-in paperwork. Now is the time to call your community and confirm that everything is good to go. This will provide peace of mind and spare you the hassle of filling out last minute forms.
- **Figure out your loved one's new contact information.** Will they be using a landline at their new community? Do they have a cell phone, or will you be purchasing one for them? Make a plan for how you will stay in contact with your loved one and make sure it is understood by all parties.
- **Make sure your loved one has an emergency pendant.** If your loved one has mobility issues or is at risk of falling, it is essential for them to have an emergency pendant. That way, if they fall and no one is around, they can contact emergency services at the push of a button. You can check with your community to see if they offer pendants or purchase one from an outside company.
- **If applicable, ask your community for gate codes so that both family and the moving company can gain access.** If your assisted living community is part of a larger residential retirement community, there may be a gate that needs to be entered through to gain access. There also may be separate codes designated for your loved one, moving companies, and family. Contact your community to get the codes, and make sure to store them in your phone or somewhere you won't lose them.

That's the breakdown of our top tips for moving to assisted living. In addition to following the steps in this post, make sure to speak with your community to see if they have any other recommendations.