



It's more than a move  
It's a new beginning  
It's a new chapter in life



**NASMM**  
National Association of  
Senior Move Managers  
Premier Providers of Senior Relocation

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Making a move at any age can be difficult and stressful. Whether you've, or even by years in your current home, the process of rightsizing and relocating to a new home is overwhelming.

NASMM members are highly qualified Senior Move Managers who specialize in helping older adults and their families through the daunting process of transitioning to a new residence.

NASMM members understand that your move is so much more than just a move. This guide has been developed to provide you with tips and checklists to enhance your moving experience.



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Founded in 1971, the National Association of Senior Move Managers is a not-for-profit, professional association of organizations dedicated to assisting older adults and families with the physical and emotional demands of later life living including downsizing, relocating, or modifying their homes. It's the only professional association in North America devoted to helping the rapidly increasing baby boomer population with middle and later life transition issues. NASMM members are committed to maintaining the dignity and autonomy of all older adults.

**national association of senior move managers**

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# Senior Move Management

Senior Move Management is the profession that assists older adults and their families with the emotional and physical aspects of relocation and moving in place. Senior Move Management professionals – Senior Move Managers – have backgrounds in gerontology, social work, health care, nursing and psychology, others come to this industry from the corporate world of project management, technology, accounting or marketing. Senior Move Managers require a profound commitment to connecting with older adults and a desire to perform meaningful work.

**Research shows an increasing number of Americans are not moving out of their homes.**

The numbers tell the story. The U.S. population aged 65 and over will increase nearly 50 percent when the baby boom generation retires from 2013 to 2030. By 2030, the elderly will account for one-third of the total U.S. population. Did you also know that Americans age 65 and above comprise the fastest growing segment of the U.S. population.

Today, many families are geographically dispersed and adult children are often not able to help with the moving process due to distance, career and family obligations. For family members living far away, the barriers may be geographic.

Many seniors have no surviving children, or increasingly, their children are older adults themselves. "If illness or death precipitates the move, the family is likely already drained both emotionally and physically. They need help. Senior Move Managers respond to all these needs and to facilitate the transition for everyone involved.

Elder adults making a transition have usually not moved in 10, 20 or 30 years and need to downsize considerably. The organizational and physical tasks associated with planning and implementing such a complex move can be overwhelming for the entire family. Seek the help of experienced, insured professionals and call a Senior Move Manager.

**Research shows that 75% of seniors who move do so with the help of a Senior Move Manager.**

Senior Move Managers have significant expertise in resources and approaches that save money, reduce stress and produce quality results.

Personalized, client centered services are designed to meet the client's needs and preferences. Families, particularly, should never doubt the power of an outside expert.

All members are reviewed for insurance and experience requirements prior to acceptance. Additionally, all members are required to take certification classes in Senior Move Management Ethics and Safety. These programs, along with all ongoing educational programs reflect the commitment to professionalism and to working with older adults.

All members adhere to a Code of Ethics and Standards of Practice and all members are guided and supported by the Ethics Committee.

(One call to a Senior Move Manager can connect you with services older adults and families need for a seamless, successful transition of all kinds.





# Are you a Senior Move Manager?

What are the questions to ask when hiring a Senior Move Manager?

- ( How long have you been providing senior move management services?
- ( Have you participated in any formal training?
- ( Are you fully insured for liability and workers compensation?
- ( Do you charge by the hour or by project? If so, it recommends fees should be provided in writing to the consumer or responsible party **prior** to providing services.
- ( Will you provide a written contract?
- ( Can you provide references?
- ( Are you a member of the International Association of Senior Move Managers (IAMM)?
- ( Do you offer customized door-to-door services?
- ( Do you provide organizing, sorting and downsizing services?
- ( Do you arrange for the reliable disposal of unwanted items through auction, estate sale, buy out, consignment, donation, or a combination?
- ( Do you interview, schedule and oversee movers?
- ( How is the billing arranged for the movers?
- 2. How do you coordinate with the client's family? Do you coordinate with the client's family to ensure they are comfortable with the process?
- ( Do you completely unpack and set up the new home? These services include unpacking everything, hanging pictures, draperies, installing electronics, etc.
- ( Will you handle the transfer of my utilities, mailing address, etc.?
- ( What additional services do you offer? Items to consider include:
  - ( house cleaning
  - ( waste removal
  - ( shopping
  - ( senior escort
  - ( assisting with selection of a realtor
  - ( helping prepare the home to be sold

Senior Move Managers have extensive, practical knowledge about the costs, quality and availability of various local community resources. Additionally, Senior Move Managers frequently assist individuals who choose to stay in their own homes, but simply require efficient organizational skills and solid knowledge of aging in place concepts to help them achieve their goal of ... not moving anywhere, but improving quality of life.



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## 7ar7 arD n( a44

"ts never too early to begin the downsiKing Arocess. 3 egin by focusing on tyAical Aroblem areas such as the attic, basement, garage, closets, We cabinets.

## e7 enero86

Since you can't take everything you own to your new home, now is the time to make arrangements to MiYP some of your treasures to sAecial Ae0Ale in your life in cluding, and esAecially family, helAful neighbors, friends, favorite organiKations, or a church or synagogue.

## ave b8r e1 or-e6

l ou may have boI es of old Aotos from every holiday, vacation and birthday Aarty attended. / hat do you do with them. 0 onsider the following ways to Areserve family Aotos and storiess a customiKed Arocess of audio and video recordings called Life Storying. 0 oAy your sAecial Aotos on to 0 Us, or try your hand at scraA booking. ftlso services now el ist that will take all your Aotos, slides, and videos and do it for you.

## e: oo6 br oo6

"f you own large Buantities of books, you need to sAend time downsiKing your collections. 3 ooks occuAy lots of sAce and are heavy to move. 0 onsider donations to libraries or senior centers, or sales to used bookstores. 0 all on a book dealer for older books with Aotential value.

## De 74 on7 ove 7 87

, ake an inventory of your canned goods, froKen foods, and AaAer Aroducts. ) lan to use as many of these Aroducts as you can before moving. "f you simAly have too many of these items, think about Aassing them on to a local food Aantry. 0 heck to see if the Senior 8 ove 8 anager you hire AarticiAates in ' ftS 8 8 8 ove 5or ! unger "nitiative.

## 7eDe 7e ! oLn6

, ake time to Aut together a boI or two of houshold, yard, and automotive cleaning Aroducts, as well as Aaint, that are considered haKardous. . isit 4 arthl ee.org for more information on haKardous collection in your area.

## on7 o6e ! o8

0 reate a list of Ae0Ale, Alaces, and utilitiesoservices that need to be notiWed of your uAcoming change in address.

## 4aDe On Dea(

8 ost Senior 8 ove 8 anagers can Arovide you with a customiKed Xoor Alan of your new residence. ft Xoor Alan will helAyou determine the Aieces of furniture that will W in your new home, and the best location of each. 8 nowing which Aieces will W in your new sAce will helAyou in your rightsiKing Arocess.

## aDa 8rv-va0 a

) ut together a survival bag for move day. "t might in clude Aersonal needs kmedications, eyeglasses, toiletries, change of clothes, imAortant AaAers, etcirkitchen needs ksnacks, drinks, folding chair, disAosable cuAs Alatesir basic tools khammer, screwdriver, Xashlight, taAe, etc.ir cleaning suAAlies kAonge, roll of AaAer towels, soaA, etc.ir and Aayment for mover Nbe sure you know which form of Aayment they acceAt.

## 6 or e04

Uon't be too Aroud or indeAendent minded to ask for helA 8 oving is not easy and you shouldn't do it all yourself. 3 ut don't wait until the last minute to ask for helA Some of these downsiKing steAs reBuire months to accomAlish. T e best Alace to W id helA is through the ' ational ftssociation of Senior 8 ove 8 anagers kwww.nasmm.orgi.

# Assisted Living

Assisted living communities are designed to provide a safe and secure environment for residents who need assistance with daily activities. These communities offer a variety of services, including meals, housekeeping, and transportation. Residents typically live in private apartments or studios and have access to common areas and outdoor spaces. Assisted living is a good option for those who want to maintain their independence while receiving the support they need.

## What is Assisted Living?

Assisted living, also referred to as a life care community, combines residential accommodations with health services. The purpose of an assisted living community is to allow residents to receive the appropriate care across a continuum, from independent living to assisted living and skilled nursing care, as their needs change, without having to leave the retirement community. This model ensures residents will be cared for through end of life. Communities usually charge residents an entrance fee as well as a monthly payment. The entrance fee may include the cost of purchasing a unit, or it may be a one-time fee.

Whether a community is decided by the level of care that you require, and where you reside, from independent living to assisted living and skilled nursing care. In independent living, the only payment is private payment. Assisted living is not covered by Medicare, Medicaid, Managed Care and Medicaid, but is covered by certain long-term care policies, 0 "and . Veterans Benefits. Skilled nursing is covered by Medicare, Managed Care, Medicaid, Medicaid, long-term care insurance, 0 "and . Veterans Benefits.

## Assisted Living

Assisted living is a general term used to describe residential facilities that provide care for individuals who cannot live independently, but do not require twenty-four-hour skilled nursing care. These facilities typically serve individuals age 18 and older, although younger persons with similar needs may be served as well. Some facilities also offer Alzheimer's and/or dementia care.

Assisted living facilities provide room and board, some housekeeping, social activities, supervision and assistance with basic activities like personal hygiene, dressing, eating and walking. Facilities either provide or arrange transportation for residents. Most facilities offer three meals per day, as well as snacks in between meals.

These communities are considered non-medical facilities and are not required to have nurses, certified nursing assistants or doctors on staff, although many facilities do have medical staff either onsite or on call. Medications can be stored and distributed for residents to self-administer.

Medicare, Medicaid and Managed Care do not cover care in assisted living communities. In some states, Medicaid will pay for assisted living; however, very few facilities accept Medicaid as reimbursement. Long-term care insurance policies, 0 "and . Veterans Benefits sometimes can cover the cost of assisted living facilities. Most assisted living is private pay.

*continues*



# Understanding long-term care

Some assisted Living facilities stratify costs along three or four levels of care, with all costs of care included in the monthly fee. A higher level of care results in a higher monthly fee. Others have a basic monthly cost and costs for additional services are added on a fee-for-service basis. Some have a hybrid of the two systems, with stratified costs by level of care plus additional fees for certain services. In short, cost structures vary considerably and can be quite complicated.

Although the components of each level of care vary from facility to facility, some basic guidelines do exist. Many facilities use a point system to determine a resident's required level of care. The cost of care fee varies if the resident is considered independent and doesn't require any help. This can also apply to residents who only need verbal instructions to complete the activities of daily living. Residents who do require care are assessed prior to moving into the facility. The components that typically determine the level of care a resident requires are bathing, clothing, grooming, mobility, continence, caregivers, eating, medication, laundry and dementia.

## Skilled nursing

Nursing homes or convalescent homes are also known as skilled nursing facilities, or SNFs. SNFs are live-in facilities that provide medical treatment as prescribed by a physician. These nursing care facilities cater to several types of patients: some patients require short-term rehab while recovering from surgery; others require long-term nursing and medical supervision. In addition, some SNFs offer specialized care programs for Alzheimer's or other illnesses, or short-term respite care for frail or disabled persons when a family member requires a rest from providing care in the home.

SNFs provide 24-hour nursing care and rehabilitation services such as physical, speech and occupational therapy assistance with personal care activities such as eating, walking, bathing and using the toilet, coordinated management of patient care, social services and activities.

The primary ways to pay for skilled nursing facility care are Medicare, Medicaid and Managed Care, Medicare, Long-term care insurance policies, out-of-pocket, Veterans Benefits or Private Payment. Most skilled nursing care at a facility is covered initially by Medicare. If your Medicare coverage stops, your options are Medicaid, Private Payment or a combination thereof.

## Services provided

On first 30 days in a Medicare-approved skilled nursing facility

On days 31-90 Medicare pays for all covered services except for a daily coinsurance amount which adjusts annually. Visit [www.cms.gov](http://www.cms.gov) for current Medicare coinsurance rates.

Outpatient visits

Skilled nursing care

Semi-private room rates

Full meals including special diets

Physical, occupational and speech therapies

Lab and X-ray services

Prosthetic devices

Prescription drugs

Some medical supplies and equipment



# Anderson v. Anderson

## Conditions and Limitations

- / Strict limitations exist for Medicare coverage in skilled nursing facilities
- / Beneficiary must be in the hospital for consecutive days, not counting day of discharge
- / Must be admitted to skilled nursing facility within 30 days of hospital discharge
- / Services must be related to condition that was treated in hospital
- / Must require daily skilled nursing or rehabilitation services
- / Must be determined that services can only be provided on an inpatient basis
- / Doctor must specify need for daily skilled care services
- / Doctor must recertify need at day 30 and day 60 after admission, and every 30 days thereafter
- / Medicare must review and approve continued need for skilled care services
- / Skilled nursing facility stay must be 30 days or less
- / Medicare must approve the length of stay 30 days are not automatically granted

## Anderson v. Anderson

"In our current economy, many individuals are reluctant to move because of a perceived or real decrease in the value of their home. Most estimate staying at home as free. However, numerous, hidden costs are associated with remaining at home, even with a fully paid mortgage. Below is a cost comparison of staying at home versus moving to an Independent Living Community.

The table below compares amenities you currently pay versus what you would in most cases find included in your rent at a community. Include any additional costs not listed that you may currently pay to gain a better understanding of where you stand, versus the cost of living in a community.

Amenities	Your Current Cost	Included (Community)
Meals		1-3 meals included (varies by community)
Housekeeping		Weekly or bi-weekly included
Home Maintenance		Included
Lawn Maintenance		Included (some communities have options for you to do your own gardening with cottage) style living)
Water		Included
Electricity		Included
Cable		Included
Gas		Included
Insurance		Included (you should purchase property insurance to cover your own personal property)
Trash Removal		Included
Entertainment		Included
Mortgage Payment/Rent		Cost of apartment/cottage
Real Estate Taxes		Included





# AnderZan nA en or A v nA

It is at the core of all the various activities of the firm, so this is a **critical** **core** **competence** **in** **the** **firm** **itself** **and** **in** **the** **market** **as** **a** **whole**.

Level of Care Chart				
INDEPENDENT	ASSISTED LIVING/SUPPORTIVE LIVING			SKILLED NURSING
0	1	2	3	4
Independent	Minimum Assist	Stand-By Assist	Hands-On Assist	Total Assist
Independent in an emergency, able to negotiate stairs in an emergency.	Able to respond in an emergency.	May need assistance in an emergency.	Needs assistance in an emergency.	Needs supervision in an emergency.
Able to accomplish all ADLs without intervention from staff or family: <ul style="list-style-type: none"> <li>• bathe, dress, groom</li> <li>• transfer and ambulate</li> <li>• toilet</li> <li>• eat and take medications</li> <li>• communicate</li> </ul>	<ul style="list-style-type: none"> <li>• Walks/transfers independently; infrequent falls; independent to verbal reminders.</li> <li>• Independent with medications/doctors' appointments.</li> <li>• Continent bowel/bladder.</li> </ul>	<ul style="list-style-type: none"> <li>• Transfers/stands by assist may be needed.</li> <li>• ADLs - reminders to verbal cues.</li> <li>• Medication management helpful.</li> <li>• Occasional incontinence assistance.</li> <li>• Bathing set-up helpful.</li> </ul>	<ul style="list-style-type: none"> <li>• Transfer - one person assist usually needed.</li> <li>• ADLs - verbal cues to hands-on assist.</li> <li>• Medication management.</li> <li>• Incontinence management.</li> <li>• Bathing assistance needed.</li> </ul>	<ul style="list-style-type: none"> <li>• Transfers - mechanical lift/two-person transfer/bedfast.</li> <li>• ADLs - hands-on assistance.</li> <li>• Medication/behavior management.</li> <li>• Incontinence management.</li> <li>• Bathing assistance.</li> </ul>
Meals/housekeeping assistance is helpful.	Meals/nutrition/house-keeping assistance is helpful.	Meals/nutrition/house-keeping assistance is helpful.	Meals/nutrition/house-keeping assistance is needed.	Verbal cues/hands-on assistance to eat.
Would benefit from socialization and activities - minor encouragement.	Able to independently plan social activities.	Reminders/encourage to participate in activities.	Encourage/escort to participate in activities.	Encourage/escort to activities or one-on-one visits.
Limited room service.	Oriented to self - little memory impairment.	Mild memory impairment - sometimes disoriented.	Impaired memory - poor orientation - mild confusion.	Needs 24-hour nursing supervision or skilled services - PT, OT, ST
Does not medically "need" to move.	Family "slightly concerned."	Family "concerned."	Family "very concerned and has to do something."	Needs continuous assistance.



ULs = activities of Uaily Living = ambulating = walking = bathing, continence, dressing, eating, transferring to or from a bed or wheel chair, and using toilet facilities.

# How to Hire a Professional or an

## The New York Times

Ray oldstein and his wife, 60-year-old, accumulated over 50 years

books in the 50 years they lived in the 10-acre estate ranch where they raised their four children. "The third bedroom became the second story of a library. Just cleaning out the attic was a major thing," said Mr. Oldstein, who described himself as a 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. Oldstein, 65, decided to hire Barbara Feldman, a senior move manager. Her mission: clear out the house, call in an antique dealer to look at some of the books, and arrange for charitable donations. She also needed to have their new apartment completely set up by their move-in date.

1. The estate /

## SmartMoney

"If the term senior move manager is an unfamiliar one, you're not alone. Membership in the national association

currently hovers around 25,000. 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. What do you get...? In theory, a far less stressful late-life transition: not just a clipboard-wielding organizer, but a passionate facilitator steeped in the ethical and safety issues of dealing with this often vulnerable population.

1. The /

## TODAY'S CAREGIVER

Senior move managers assist parents, grandparents and other loved ones age, their

lifestyles must change as well, including the place they call home. If stressful time in anyone's life is moving day, many companies are popping up around the country, offering practical assistance to long-distance caregivers and assistance to the loved ones needing to change location. These services are not merely the typical brawny moving guys, but professional consultants who provide room-by-room guidance.

1. The / The /

## Angie's list

After 60-year-old Louise Fitzgerald's doctor diagnosed her with a heart condition, the active 60-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. 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. Was the best money ever spent at this age, she says.

1. The /

## The New York Times

... many families are finding senior move managers indispensable, and not just because they handle the logistics. Extensions can spill over when an elderly parent must relocate. Hundreds of necessary decisions and actions can swallow time the family may not have: the inevitable negotiations and concessions can trouble even the best parent-child relationship.

1. The /



Senior move managers represent a knowledgeable, professional resource with whom geriatric care managers can partner in working with elderly hoarders. They are well-equipped to handle the labor-intensive, sometimes time-critical requirements of working with hoarders. Since they specialize in late-life transitions where downsizing is the norm, senior move managers have a variety of proven resources for disposal or donation of belongings.

1. The /



**NASMM**

National Association of Senior Move Managers

Premier Providers of Senior Relocation





(A)

# Mom's Move To Do



(B)

- ☐ Call AppleCrest Commons + get floorplan
- ☐ Design floorplan for apt. (need graph paper)
- ☐ Call/email sibs (everyone needs to give 3-4 wks.)
- ☐ Make calendar on Google for next 6-8 wks.
- ☐ Sort through all rooms + closets: built-ins, bookcases, cabinets, linen closets
- ☐ Hummel collection - what do we do??
- ☐ Clean out basement (boxes in furnace room)
  - \* slide carousels, holiday decorations, Snow Village, etc.
- ☐ Garage - what are we going to do w/ 2nd car?
- ☐ Shed - lawn mower, snowblower, hedge trimmer dad's tools
- ☐ Junk removal (how much? when?)
- ☐ Schedule garage sale (can Beth do Friday?)
  - \* contact newspaper
  - \* tag everything
  - \* have signs made
- ☐ Buy packing materials - research stores & online for least \$\$\$
- ☐ Arrange for disposal of old paint cans, etc.
- ☐ Pack !!! (Will need everyone for 4-5 days.)
- ☐ Call AppleCrest again - what do we need to know about moving in elevators, etc. ???
- ☐ Get three estimates (from movers) also call references
- ☐ Contact charities for stuff we want to donate. + about 100 other tasks!!

Bill  
Beth  
Dan  
Kristin  
Steve  
me

garage sale - when??

Moving day we will need is everyone who is available  
Remember Mom's prescriptions.

Call a Senior Move Manager  
[www.nasmm.org](http://www.nasmm.org)



NASMM members specialize in helping older adults and their families with the daunting process of downsizing and moving to a new residence.

Experienced professionals, NASMM members are bound by a pledge of integrity, committed to safety and ethics and dedicated to continuing professional development.

NASMM is the leading membership organization for Senior Move Managers and, as such, is the best place for you to find one.

NASMM members will move you expertly, compassionately and affordably.

**It's so much more than moving.**  
**Let us help.**

[www.nasmm.org](http://www.nasmm.org)  
877.606.2766

Vikes High!





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