



Moving Checklist

So much can go into a move, and often times, some things can easily be overlooked. Below is a list of tasks that you should consider both prior to and after your move.

Before Move

- Work with your financial planner to determine what issues you should consider when buying a new home.
 - Mortgage-related issues
 - Down-payment & closing
 - Updated cash flow and budget
 - Tax planning
 - Estate planning
- Prior to making an offer, go to your new home at different times of the day to get an idea of what to expect.
- Purge house for any thing you do not want or no longer use.
 - If you don't plan on keeping it in your new house, go ahead and get rid of it!
 - For anything you donate, create a list for the purposes of possible deductions when you file your taxes.
 - Many organizations will come to your house to pick up donated items. You may want to consider this - especially for larger items or if you intend on donating enough that will involve multiple trips to the drop-off location(s).
 - Any items that can be sold, consider a pre-move garage sale, or sell items platforms such as Craigslist or Facebook Marketplace.
 - For item that cannot thrown away (i.e., old paint, flammable liquids), drop off at your local household hazardous waste facility.
 - Any food that is not expired in pantry, consider giving to local food bank.
- If large purchases are going to be made (e.g. furniture) choose a delivery time that coordinates for a day after your moving day.
- Create a game plan for moving day
 - Begin to stock up on moving supplies.
 - Whether you purchase boxes, moving paper, tape or plan on using whatever you can (Amazon boxes, boxes from friends and family, etc.), once you know you are going to move, it is never too early to start stocking-up!
 - While it is a cost, consider purchasing boxes that are all the same size which will make the packing of a moving truck much easier and efficient. U-Haul, Home Depot, and Lowes are sell moving boxes at a fair price.
 - If you have pets, determine how you will move them.
 - Consider boarding or having someone not assisting with the move watch them. If moving to another city, consider moving pets a couple days before and boarding until you are fully moved in to your new home.
 - Determine what will be moved in moving truck and what will be transported via your own vehicle.
 - Create a floorplan for the move and designate each room and number; pack each box by the room and label each room by a corresponding number (or a system that creates ease and efficiency for moving)

- For example, your Living Room may be Room 1. The box should only include items designated for as well as have “1” or “Room 1” written on it.
- For items that cannot be packed in a box (e.g., sofa, bedframe, etc.) tape a piece of paper onto the item with the room number to maintain an efficient move.
- Whether your hire movers or have family and friends help you move, notify individuals of your system prior to packing up moving truck at old home and before unloading at the new home.

Decide if you are going to use movers or Do-It-Yourself (DIY).

- If you intend on using movers:
 - Obtain quotes from at least three (3) companies in order to receive a competitive quote.
 - In addition to their price, inquire on other important factors such as numbers of moves, estimated time to move, and whether or not they provide services such as packing boxes.
 - Once moved, check for any potential damages and notify the moving company as soon as possible.
- If you intend to DIY:
 - Obtain quotes from different rental companies to determine the rental cost and price per mile.
 - Verify with your auto insurance company on coverage extending to rental trucks and trailers. Many times, coverage is not extended, therefore, it will make sense to purchase the additional insurance coverage on the rental.
 - Don’t want a moving company handling your fine china? Consider hiring them for a limited engagement to move large, bulky, and heavy items. You’re back with thank you later. Companies like U-Haul have a list of individuals who will take care of something like this for you.

Schedule to disconnect, cancel, or transfer of service for the following prior to closing on old home:

- Internet
- Cable
- Utilities (Water, Power, Gas, Garbage)
- Home security system
- Gym
- _____
- _____
- _____

Begin the process of transfer of records for the following:

- Medical, Dental, Vision (if moving location where you will need a new doctor)
- School
- Subscription services (Amazon, etc.)
- _____
- _____
- _____
- _____

Complete a change of address form at your local USPS or online.

- Once notification of forwarding period is received, make note on your calendar of the last day mail will be forwarded to your new address.

After Move

- Update Driver's License.
- Once Driver's License is updated and copy of deed is received, apply for homestead exemption.
- Change padlocks on doors; have at least two keys per lock.
- Change any other locks outside door (e.g. lock on fence, mailbox, etc.).
- Purchase new garage door openers and reset settings on garage door.
- Update addresses for the following:
 - Banks
 - Credit Cards
 - Retirement & investment accounts
 - Social Security/Medicare
 - Insurance
 - Home, auto, personal property, life, disability, long-term care, and health
 - Subscription services
 - Cell phone
 - Organizations (especially those that require notification in a certain period of time!)
 - Current and/or former employer
 - _____
 - _____
 - _____
 - _____
- Update your voter registration.
- Confirm that all mail is being forwarded to address; use as opportunity to change address for anything you may have forgotten.
- Complete or update home inventory.
- Create a "We Moved" postcard and send via mail or email to your family, friends, and any other important contacts.
- Enjoy your new home!