The Ultimate Estate Downsizing Checklist

A 30-Day Framework to Organize, Categorize, and Liquidate with Dignity

Provided by Lighter Legacy

Navigating a lifetime of belongings is an overwhelming task. Whether you are an executor managing an estate or a family member helping a parent downsize, it is easy to become paralyzed by the sheer volume of decisions.

Take a deep breath. You do not have to do all of this in one weekend. This 30-day framework is designed to break the process down into manageable, bite-sized phases.

Phase 1: Preparation & Security (Days 1–5)

Before you move a single piece of furniture, you must secure the property and locate critical paperwork.

- ☐ Secure the Property: Change locks if necessary, ensure windows are locked, and check that the home insurance policy is active.
- ☐ Forward the Mail: Set up mail forwarding with the USPS to the executor’s address to catch lingering bills, subscriptions, or bank statements.
- ☐ Locate the "Must-Find" Documents: Create a secure folder for the following:
    - ☐ Will / Trust documents
    - ☐ Life insurance policies
    - ☐ Real estate deeds and vehicle titles
    - ☐ Recent bank and investment statements
    - ☐ Safe deposit box keys or combinations
- ☐ Halt Subscriptions & Utilities: Cancel cable, internet, streaming services, and automatic deliveries. Keep power and water active while you work.

Phase 2: The Sorting Framework (Days 6–15)

Do not try to clean out the house room by room. Instead, use the "Keep, Sell, Donate, Toss" system. Set up four distinct zones (use colored sticky notes or different colored trash bags).

The Golden Rule: Touch an item once. When you pick it up, it MUST go into one of the four categories. Do not create a "maybe" pile.

1. The KEEP Pile (Family & Sentimental)

- ☐ Distinguish Sentimental vs. Valuable: Sentimental items (photos, handwritten letters, a favorite sweater) have high emotional value but low market value. Secure these first.
- ☐ Establish Family Deadlines: Invite immediate family members to claim specific items. Crucial: Give them a strict deadline (e.g., "Items must be picked up by the 15th"). If they do not pick it up, it moves to the Sell or Donate pile.

2. The SELL Pile (Hidden Valuables)

- ☐ Identify High-Value Items: Set aside fine jewelry, precious metals (silver/gold), original artwork, mid-century modern furniture, and vintage collectibles.
- ☐ Do Not Throw Away Old Paper: Vintage magazines, historical letters, or old comic books can sometimes be highly valuable to collectors.

3. The DONATE Pile (Usable, but Unsellable)

- ☐ Gather Everyday Items: Standard kitchenware, heavily used furniture, clothing, and older electronics.
- ☐ Schedule Pickups: Contact local charities (Salvation Army, Habitat for Humanity, local shelters) and schedule a truck to pick these items up in bulk.

4. The TOSS Pile (Trash & Hazardous Material)

- ☐ Clear the Junk First: Removing obvious trash creates immediate breathing room. Rent a dumpster if necessary.
- ☐ Separate Hazardous Waste: Set aside old paint, chemicals, cleaning supplies, and tube TVs. These usually cannot go in standard dumpsters and require special local disposal.

Phase 3: Clearing the Clutter (Days 16–20)

Before dealing with the complex "Sell" pile, get the rest of the items out of the house.

- ☐ Execute Family Pickups: Enforce the deadline you set in Phase 2.
- ☐ Execute Donation Pickups: Have the charity organizations collect their items.
- ☐ Remove the Trash: Have the dumpster hauled away or make a trip to the local landfill.

You should now be left with only the items you intend to sell, making the house feel significantly lighter and easier to navigate.

Phase 4: Liquidation & Professional Help (Days 21–30)

Now you must decide how to liquidate the "Sell" pile. Selling items individually on Facebook Marketplace or eBay takes hundreds of hours. For a full estate, hiring a professional liquidator is almost always the best financial and emotional decision.

Questions to Ask Before Hiring an Estate Liquidator: If you decide to hire professional help, interview them like an employee. Ask these questions:

- ☐ What is your commission structure? (Standard rates range from 30% to 50% depending on the region and the quality of the estate).
- ☐ Are there any upfront fees or hidden marketing costs?
- ☐ Do you offer a "Broom-Sweep" cleanout? (This means they agree to empty the house completely and sweep the floors after the sale is over, leaving it ready for real estate agents).
- ☐ Are you insured and bonded?
- ☐ How do you handle items that don't sell? (Will they donate them for you, or leave them behind?)
- ☐ Can I have a written contract detailing the timeline and payment date?

Feeling Overwhelmed? We Can Help.

You don't have to guess which local liquidators are trustworthy. **Lighter Legacy** connects families with compassionate, heavily vetted estate liquidators, downsizing experts, and cleanout specialists in your exact zip code.

Instead of dealing with spam calls, tell us what you need, and we will personally match you with up to two approved professionals who can handle your specific situation with dignity.

Visit us at LighterLegacy.com to request a free, private consultation today.