

Move managers help seniors with difficult relocations

Jenifer Goodwin
Friday, May 15, 2009

Tom Cozens helped his elderly uncle move three times, each to a progressively smaller residence: from a rented guest house to a senior apartment to a studio in an assisted living center.

Lifting boxes was the least of the work. Cozens, 61, also had to soothe his uncle's distress over the unwelcome change and try to persuade him to toss spices with sell-by dates from 30 years ago.

When it came time to move his uncle a fourth time – from the third floor to the first floor of the assisted living center – Cozens hired a senior move manager.

For a fee ranging from \$2,500 to \$5,000, senior move managers will orchestrate nearly every aspect of a move, including helping seniors determine what to take to their new residence, organizing floor plans, hooking up utilities and electronics, hanging pictures and draperies and unpacking items in a way that closely matches how things were before.



“Seniors need help when they have to move,” said Linda Diller, who founded [Only the Best](#) senior move management in Encinitas five years ago. “Families are scattered or people have outlived their families. We try to do our part to take away some of the physical and emotional stress.”

America's aging population and tendency to outsource unpleasant jobs has spawned a growing industry. The [National Association of Senior Move Managers](#) was founded in 2002 with about 20 members. Today, it has 500.

Moving is taxing at any age, said Mary Kay Buysse, executive director of the Chicago-based organization.

For seniors who may have chronic health conditions, mobility issues or dementia, leaving a home they have lived in for decades can be overwhelming.

Adult children, busy with families and jobs, may not have the time or the patience to help, especially when it includes sorting through decades of accumulated possessions.

“For seniors, moving is more complex than putting boxes in a U-Haul,” Buysse said.

To smooth the transition, Diller, a former concierge and conference manager in the luxury hotel industry, consults with clients about the furniture they most treasure and ways of making it work in the new residence. She takes photos of the contents of every drawer so she puts items back in their proper places.

For clients who have dozens of photo albums, she suggests scanning photos and uploading them onto space-saving digital frames.

Cozen's uncle died in March at age 82. Hiring Diller for his final move was well worth it, Cozen said.

“When you're looking after an older person, you need help. You really do,” said Cozens, a Carlsbad real estate agent. “She saved my time, my back, my sanity.”

If you're considering hiring a senior move manager, keep in mind:

1. Anyone can call himself a senior move manager, so buyer beware when hiring one. The National Association of Senior Move Managers does some limited vetting. Members must provide at least two letters of reference from past clients and have proper liability insurance.

Before hiring anyone, the NASMM recommends asking how long they've been a senior move manager, if they've had any formal training, if they have professional credentials, if they carry liability and workers' compensation insurance, if they can provide references and if they provide a written contract that details all services provided.

2. Senior move managers may know tricks to make parting with treasured items easier. One woman had a collection of 65 teapots that would overwhelm her senior apartment, Buysse said. The woman chose her three favorite teapots to take with her. The senior move manager shot pictures of the rest and arranged the photos into a poster-sized collage to hang as art.

3. Fees range from \$40 to \$80 an hour and do not include the actual movers, although senior move managers can help recommend a reputable company.

4. Some senior living communities are recommending and even paying for the service for incoming residents. Check to see if yours is one of them.

The Record - Hackensack, New Jersey

Senior movers grow as space needs shrink

Thursday, May 14, 2009

BY ELIZABETH LLORENTE
STAFF WRITER

The often emotion-wrought step for senior citizens of leaving behind a house — and community — they've lived in for decades has spawned a fast-growing business: moving seniors.

Senior move managers help the elderly, and their adult children, come to terms with the arduous decision to downsize to a smaller living space. Among the factors involved in this choice are high taxes that pose a challenge to people on fixed incomes, a medical condition that renders maintaining a home difficult or impossible, or the fact that a large home is no longer needed.

"You're faced with moving 50 years of stuff from a 2,500-square-foot home to a 500-square-foot apartment or assisted-living place," said Jennifer Pickett, associate executive director of the National Association of Senior Move Managers, or NASMM. "It becomes an overwhelming situation. Sometimes it's not so much the objects — what to take, what to give the children and grandchildren, what to sell, what to get rid of — that's the real issue. It's the memories they don't want to part with."



The percentage of Americans 65 and older has risen to 12.6 percent, or 37.9 million, as of 2007, from 12.4 percent, or 35 million, in 2000, according to U.S. Census figures. As the number of aging Americans grows, so does the number of people forced to downsize from a home where they have lived for much of their lives.

NASMM has had a bird's-eye view of the growth in demand for consultants who, at their best, can offer more objective advice on what senior citizens making a move should take with them, and sell, give away or discard.

Two years ago, the organization had 60 members nationwide. Today, it reports more than 500, Pickett said. And more than half of its members have been in business two years or fewer, according to the group's website.

"When I decided I wanted to move from my apartment in Bergen County to Las Vegas, I couldn't figure out what to take, what to get rid of, how to get rid of it," said Louis "Larry" Liebster, a retired pediatric dentist. Liebster lived in Ridgefield Park until last fall, when he moved to Nevada.

"I thought, 'Maybe I just won't take anything with me.' Then I thought 'I can't do this, leave everything, I have a whole life in my past, I wanted mementos.' But I couldn't pick."

So Liebster, who recently turned 80, called a Teaneck move manager, Sharon Bregman, owner of 360 Demenager, after Googling the concept of senior move manager associations.

Bregman, he said, took the anxiety out of the experience, offering him a mix of reassurances, her opinion on whether to drive to Las Vegas, and exchanged e-mails with him right through the time he settled in his new apartment.

"I left on Sept. 11 last year, and she dealt with my landlord, she got me my full security deposit back, she closed out my apartment and gave the keys to the landlord on Sept. 20," Liebster said. "For me, it offered a bit of hand-holding, but also it made things move more expeditiously and gave me a sense of direction."

Senior move managers typically do not handle the physical part of moving — they generally help in the planning, packing, sometimes overseeing the physical move, and sometimes help their clients settle into the new place. Many charge about \$150 an hour in this part of the country.

"It's hard for seniors to move," Bregman said. "They generally don't want to leave; they don't like the sense that they're losing their independence. They're giving up the familiar, where they raised a family."

Saturday, April 18, 2009

A life in boxes: Sorting through elderly parent's belongings

BY ANA VECIANA-SUAREZ

When Jackie Collaso moved her widowed mother from a four-bedroom home to a two-bedroom apartment, she sorted through 30 years of photographs, knickknacks, mementoes and family heirlooms.

"It was overwhelming," Collaso, a retired teacher, recalls. "My mother was not a throw-away, so it was amazing how much stuff she had."

A second move to an assisted living facility four years later required even more painful downsizing -- something her mother couldn't bear to do with her full-time caregiver. So it ended up being Collaso's responsibility.

As Americans live longer -- and buy more -- adult children are facing the dilemma Collaso encountered: How do you deal with and dispose of your parents' lifetime accumulation of furniture, clothes, pictures and other stuff when they die or move out of the family homestead?

Collaso's story is far from unusual. In fact, the increase in downsizing households has given birth to a niche industry: organizers who specialize in moving the elderly. The National Association of Senior Move Managers (NASMM) was founded in 2002 with 22 members in the United States and Canada. Today it has 500 members, including more than 30 in Florida.



NASMM members do more than just move a client from one place to another. They organize and sort, come up with a customized floor plan for the new home, interview and oversee movers, pack goods, arrange shipments and storage, arrange for sale or donation of items, and unpack and set up the new home. The cost of a typical move within the same community can range from \$1,500 to \$4,000. Most moves are to assisted living or independent living communities.

Executive Director Mary Kay Buysse says demographics explain the spike in their membership. By 2030, the elderly will account for one-fifth of the total U.S. population, she says, citing census figures, and Americans age 85 and above will account for the fastest growing segment.

"Not only is the population aging," Buysse says, "but families are spread all over the country, making it very difficult for them to do the sorting and moving for their parents."

The task of sorting through elderly parents' belongings may be more difficult for the current generation than previous ones. "They have to deal with the Depression generation," says Julie Hall, a professional estate liquidator and author of *The Boomer Burden: Dealing with your Parents' Lifetime Accumulation of Stuff*. "That group doesn't really let go of much. They keep everything -- just in case."

And that everything can include boxes of old newspapers, a closetful of clothes that haven't been worn in decades, even years' worth of old bills, bank statements and tax returns. In other words, stuff with no value.

"With each passing year, I'm busier than ever," Hall says. "And as America grays, there's a tidal wave coming."

EMOTIONAL PROCESS

The problem is compounded because many families never talk about how Grandma's vase collection or Dad's pocket watch should be distributed -- even if they have a will for other assets. "Few people ever talk about this, but it's one of the most emotional -- and frustrating -- things a person can go through," says John Admire, a Miami estate lawyer. "I can't emphasize enough how important it is for families to sit down and talk about this *before* anything happens."

Barbie Fernandez had that opportunity when her father-in-law passed away and her mother-in-law moved into Barbie's and husband Oscar's Kendale Lakes house. Yolanda Fernandez sold the three-bedroom Hialeah home where she had lived for more than 40 years to longtime neighbors, who also bought most of the furniture. She then divided belongings among family members -- the deceased father's jewelry and other items went to the three sons and grandchildren. Photographs were taken out of their frames and arranged in a compact album.

"The things she really liked, like this painting of an angel and some angel figurines, she brought with her to our house," Fernandez says. "There were no surprises, no secrets."

In June, when Yolanda Fernandez's dementia worsened, Barbie and Oscar moved her to an assisted living facility in West Kendall but kept her room intact for her visits. "It's important to give them time to grieve for what they're losing," Barbie says. "It's a whole process of adjustment."

Even if an adult child lives nearby, she may not want to deal with what Buysse calls "the crush of clutter" accumulated over decades. And crush is a good word for it. Barbie Fernandez says she found hundreds of party favors from baptisms, weddings, *quinces* and assorted family

events in her mother-in-law's house -- all items the old woman obviously valued but that had little meaning for others.

"For us it's more of a business transaction," Buysse says of the sorting that eventually lands some of this stuff in the garbage. "We allow the adult children to connect without having to be the bad guy. We're the ones saying, 'You have to get rid of this. It's not going to fit in your new home.' We show them the magnetic board with the floor plan so they can actually see that, yes, the armoire is simply too big."

Nancy Ackerman-Hirsch of Broward-based TransitioningLifestyles and Changes helped Dana Thomas-Panisch and Barbara Thomas move their mother from a one-bedroom apartment in an independent living facility in Plantation to a room in an assisted living section.

"She did everything for us," Thomas-Panisch says, "including putting the pictures up and the tchotchkes in their place, so that when she got there, it was like home, just smaller. It was a relief."

The physical act of moving, though, was the easy part. Deciding what to do with some of Marjorie Thomas' belongings was "a monumental task" that they left up to Ackerman-Hirsch. With the senior mover's help, the sisters kept some of their mother's art work to hang in their own homes; photo albums were packed into boxes. Thomas-Panisch also kept her mother's collection of old children's textbooks and an encyclopedia set that is more than 60 years old. She wants those for her own children.

Not all downsizing moves -- or estate liquidations -- go as smoothly, of course. Admire, the Coral Gables estate lawyer, says he has seen his fair share of adult children helping themselves to a deceased parent's possessions before other siblings have a chance to examine the estate.

"I've gotten pretty bold in explaining that they have to respect the personal representative," he says. "They can't just walk into the house and take what they want."

HEIRS' JOB

Even if the parent has left instructions for distributing his possessions, he suggests the heirs go through the house together, photograph the items (particularly those of value), make a list and have the necessary items appraised. The cataloging helps the family devise a fair system of dividing up any items not designated for a particular person.

Sorting through a parent's drawers and closets often prompts adult children to examine their own hoarding habits. Many, experts say, rush home to clean out their own garages.

"I'm going through a moment in my life where I've realized that we shouldn't hold to material things with such passion," says Barbie Fernandez. "We keep and keep and buy, and for what? It ends up being a real inconvenience for our children."

The Washington Post

Making It

Friends help seniors move on to the next phase of life

By Elizabeth Chang

Sunday, March 22, 2009; W04

Elizabeth Striano and Danielle Sharkowicz, who met when they were both at turning points in their lives, have formed a company to help senior citizens negotiate their own transitions.

The two Lorton residents became neighbors in October 2007, when Danielle, an engineer living in North Carolina and working for a digital optics firm, moved to Elizabeth's street as the result of her husband's job switch.

Elizabeth, who has been in the area since 1995, had recently quit her job as director of communications for a nonprofit because she wanted a change. The neighbors, each of whom has two children, hit it off immediately and became the kind of friends who meet for coffee and finish each other's sentences. "We just clicked, not to sound corny or anything," says Elizabeth.

As they tried to help each other plan their next steps, they came up with the idea of assisting seniors who are moving. They were familiar with the need for such services because Elizabeth's husband works at a senior community and Danielle had helped her in-laws move out of their house of 35 years. "I had seen the garage full of stuff; I had seen the dumpster out back; I had seen the estate sale," she says.



TRANSITION MAGICIANS: Danielle Sharkowicz, left, and Elizabeth Striano help ease seniors' moves from one home to another. (D.A. Peterson)

Danielle researched data on potential clients. "I came back to the next coffee session and said, 'Wow, it's huge,' " she says of the group sometimes called the "silver tsunami." The partners also consulted with the National Association of Senior Move Managers and professional organizing associations.

Elizabeth and Danielle opened Better Senior Living in January 2008. "We didn't know we were starting in the midst of a recession," Elizabeth says wryly. "If we can make it in this market ... " Danielle finishes the thought for her: "... then we really do have something." They began soliciting business through mass mailings to Northern Virginia neighborhoods with large numbers of seniors. They help clients sort through a lifetime of belongings, arrange moves with vetted moving companies and supervise the packing. They also

handle organizing and personal shopping. They charge by the project. The fee for downsizing, for example, ranges from \$1,000 to \$2,500; the fee for managing a move runs from \$300 to \$800.

For a local move, the partners sometimes will unpack (which is a separate fee), with the help of an on-call cadre of college students and stay-at-home moms. When the clients arrive, "Everything is put away for them, and it's home," says Elizabeth. "That's our signature, I guess, but it's a long day."

"We simply could not have gotten along without them," says Shirley Lotz, who moved with her husband, Herb Bartlett, from a single-family home to a two-bedroom apartment in a retirement community. "When they finished on the day we moved in, everything was unpacked and in order."

By the end of their first full year of business, Elizabeth and Danielle had sales of \$35,000, with a net income of \$17,500. They are hoping for \$100,000 in gross revenue this calendar year: January alone brought them \$10,000 in business.

Both enjoy how the flexibility of the business allows them to spend more time with their children. And each appreciates different aspects of the job. "She loves the history of it; she eats that stuff up," Elizabeth says of Danielle. "For me, I like to make it lighthearted, a little fun."

The job can be like a treasure hunt: They've come across beloved belongings once thought lost, old love letters, a ticket to Eisenhower's inauguration. They've also found sexy undergarments. Observes Danielle: "Eighty-five-year-olds still know how to have a good time in the bedroom."

The Washington Post

THE WASHBIZ BLOG

By Dan Beyers, Terri Rugar and The Washington Post's local business staff

Value Added: The "Move Management" Industry

Washington Post, Feb 2, 2009

By Thomas Heath



My 92-year-old mother motors around her two-bedroom, one-floor ranch home in Syracuse, N.Y., with the help of a walker and comforted by a lifetime of mementos, photographs (not

enough of yours truly), her old furniture and the daily presence of my brother and sister, both of whom live close by. You couldn't pry mom from her home with a crowbar.

But many senior citizens aren't lucky enough to have family in the neighborhood and an easily navigable home. So in steps Transitional Assistance and Design, a Gaithersburg firm that helps seniors move from a beloved home to somewhere more suited to their circumstances.

"When you say moving and downsizing to anybody, their stomach probably goes south," said co-owner Joel Danick. "What we do for our elderly clients is to make something in a smaller version while maintaining the features of the original. We are the wedding planners of the moving industry."

A business school professor told me once that if you had enough money and a need, you can always pay somebody to fulfill it. That's what I thought of when I talked to Joel and Susie Danick, who started the company in 2000.

This is a cottage industry now coming to the forefront, said the Danicks. There are about 500 "move management" consultants around the country, ready to tap into the 78 million Baby Boomers headed for retirement, not to mention the dwindling members of my mom's generation.



The Danicks started their company when Susie, who was 38 at the time and a part-time nurse, helped move her grandmother from Chevy Chase to Brighton Gardens, a senior citizen living complex in Friendship Heights, right over the line from the District. The grandmother, who was in her 80s, was reluctantly leaving her spacious condominium for a small studio. She feared she was heading toward a nursing-home.

Susie painted the apartment in similar colors to the Chevy Chase place, and duplicated the furniture arrangements in the living room and bedroom areas so they were similar to what she had in the condominium.

"When she went there it felt like home," said Joel, 50.

The Brighton Gardens sales and marketing agent asked if the complex could show the apartment to other potential tenants, as a model of how cozy the new home could be. Word got around and others started asking Susie if she would decorate their apartments. She had 35 clients her first year.

The Danicks now help about 300 elderly citizens a year to downsize without losing a home that evokes familiarity and memories. Transitional Assistance and Design grosses around \$500,000, employs 14 full- and part-time workers, and provides the Danicks with a handsome income. Joel

even quit his executive position at Balducci's grocery stores four years ago to help. Believe it or not, he said his grocery skills are transferable to moving consultants. More on that later.

In the early days, Susie enlisted her girlfriends for help. They would send their kids off to school, work for five hours and head home at 2 p.m. to greet their kids when they returned. "I didn't look upon it as a business," Susie said.

She calculated her prices by calling interior designers she knew. They suggested about \$100 an hour. So she set her fee at \$35 an hour. It has grown to \$75 nearly 10 years later, which includes the redesign of the apartment. Packing and unpacking runs \$45 an hour. The blended rate ends up around \$50 an hour. The moving in between, putting the stuff in a truck and driving to the new home, is outsourced to Town & Country Movers.

"One of our core business decisions was to stay focused on management and consulting," Joel said. Another benefit: you don't have to lay out the money for a vehicle fleet.

Like most businesses, the biggest cost is personnel (nearly half). Insurance is the next biggest. Then it drops swiftly. The Danicks have a public relations person on retainer and they spend about 5 percent of revenues on materials, from wall hooks to boxes to bags. They run the business out of their Gaithersburg home, so there is no office leasing involved. Full-timers, who include a handyman, earn low five figures and the "move specialists" who do the packing, unpacking and aesthetic work around the apartment earn from \$15 to \$30 an hour, depending on their responsibilities.

Joel said the company has an IRA and matches up to 3 percent of salary; there is no health care benefit.

I guessed their net at around \$150,000, and the Danicks did not disagree.

How do you get new clients?

Mostly through word of mouth. They have built strong relationships with senior communities in the Washington region, including Classic Residence by Hyatt and at Riderwood. Some senior communities offer new residents a set number of hours of access to Transitional Assistance at no charge to the resident. The company also gets referrals from Town & Country Movers. For advertising, the Danicks' 2008 Toyota Scion XB is decal'd with company advertisements (Business tip: magnetized advertising placards can be stolen off the car).

Each move is a mission. They invade a client's home, shooting digital photos of the entire place, creating a map of the floor plan and recreating it on a small scale at the Danicks' home office in Gaithersburg, moving little scaled cutouts. Every detail is considered, from towels to window treatments, from custom paintings to china hutches. When one elderly client had accumulated 100 masks from a lifetime of travel around the world, Susie asked the client to pick five favorites and designed a wall display to bring them along.

Any new purchase above \$75, from a frame to furniture, must be approved by the client and is reimbursed.

"Every plan is customized," said Joel. "Some just need unpacking. Some need decorating help and full service in between." The minimum is about \$600 for a two-person crew for one day. One job involving moving out of an \$11 million home took a crew of 13 all day and cost thousands.

There are headaches. One client got physically ill at the last minute. Timing the use of elevators, lobbies and parking can be tortuous and time-consuming. And the job is physical. Imagine packing and unpacking your house five days a week.

There is a network nationwide of senior transitional assistance businesses. So if my mom in Syracuse wanted to move to D.C., the Danicks and a similar company in Syracuse would work it from each end, with one packing and one unpacking. The one who gets the initial contact does the coordinating.

The staff includes retired teachers, nurses, production managers and people who work in estate sales. Most are between 40 and 60. There is a lot of handholding, empathy and gentle persuasion that goes with the job.

"It's purposeful work," said Joel, who carefully screens and does background checks on all employees. He brings the same passion to the consulting business as he did in serving his customers in the grocery business, first at Whole Foods and then at Balducci's.

"They are both customer service businesses," Joel said.

There are regular employee performance reviews. Trust, reliability, and leadership skills earn employees higher pay. So does punctuality. Learning how to disconnect a chandelier or install shelving will earn you more. Supervising a crew will too.

Though the market is still untapped, the Danicks have no little interest in expanding nationally but plan to grow the business locally. They started in the first year doing 35 moves and now do around 300.

"To franchise it at the level we do it would be very difficult and diminish the quality of service," said Joel. "You can't just go to page one of the manual and start."