

pathway

MORE THAN JUST A MOVE



www.pathwaymovers.com
Grand Rapids 616.333.2556
Metro Detroit 248.499.9070



MORE THAN JUST A MOVE



OUR MISSION

We strive to alleviate the burden of moving and provide expert assistance every step of the way. We offer both emotional support and physical labor.

From downsizing and organizing, to moving and unpacking. You can count on us to handle all details with care and compassion, to ensure that your move is a peaceful experience.

Contact us today for a free consultation!

info@pathwaymovers.com

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Meet the Owners



LISA KUHN
CO-OWNER
Metro Detroit



JEANNE JONES
CO-OWNER
Grand Rapids

PATHWAY SENIOR MOVERS is a proud member of:



The owners and employees of **Pathway Senior Movers** have been trained and certified by The National Association of Senior & Specialty Move Managers (NASMM).

NASMM is the leading membership organization for Move Managers in the United States, Canada and abroad. NASMM Move Managers have significant expertise in resources and approaches that save money, reduce stress, and produce quality results. Services are client-centered and personalized to meet your specific needs and preferences.

COVID 19
Certificate in Prevention
& Safety Excellence for
Senior Move Managers®

WHY HIRE A NASMM COMPANY?

NASMM COMPANIES

VS

OTHERS



HOW WE CAN HELP



“BEGINNING TO END” PRE-MOVE MANAGEMENT PROCESS

Our process creates a stress-free transition into your new home.

- **Free In-Home Consultation** - Ensuring the smoothest and most cost effective relocation.
- **Personal Senior Moving Team** - We act as a liaison between you, your family, and your new home.
- **Moving Plan** - We create and execute a seamless plan of action including a timeline and checklist.
- **Floor/Space Planning** - We document your home, visit your new residence, take measurements, and create a floor plan to help with what moves to your new home.



DOWNSIZING & SORTING

Our experts know that downsizing presents a challenge. Let us work with you, keeping your memories and important belongings safe.

- **Organize & Sort Your Belongings** - Help you decide what you will need, and what to give to family and friends.
- **Dispersal** - Determine if the contents have specific value and process them through estate sales, consignment, donation, online advertising, private collector or re-seller. Arrangements for storage can be setup, if required.



PACKING

We have procedures in place that minimize the timing of packing. A move can be completed in as little as two days because Pathway Senior Movers provides all packing supplies and carefully arrange, pack, and inventory all boxes.

- **Fragile** - Determine safest transportation of sentimental, fragile, and oversized items.
- **Electronics** - Disconnect home electronics and assure all components are packaged and identified.
- **Chemicals** - Identify, collect, and arrange for disposal of household toxic chemicals.



MOVING

We attend to all details on moving day that includes packing any last minute items and handling all unexpected elements that may arise. Pathway Senior Movers determine the crew and van size to make moving an easy, stress-free experience.

- **Loading & Unloading** - Strategically place items in the truck for the safest transport possible.
- **Perishables** - Empty refrigerator and freezer and safely transport perishables.
- **Transport** - Transport all belongings and furnishings to new residence.
- **Furnishings** - Direct proper placement of furnishings based on the floor plan.

HOW WE CAN HELP cont.



UNPACKING & ORGANIZING

In a matter of hours, we can have your new kitchen, bedroom, or any other area you choose unpacked, organized, and ready for your arrival, replicating aspects of your old environment to help ease the stress of moving.

- **Kitchen** - Organize kitchen cabinets and closets. Complete delicate china displays.
- **Bedrooms** - Put away clothing in closets and drawers and make beds.
- **Bathrooms** - Organize linen closets and bathroom cabinets. Shower curtains will be hung if required.
- **Storage Space** - Maximize any storage space with all that needs to be unpacked.
- **Electronics** - Reconnect computers, televisions, phones, clocks, stereos, and small appliances.
- **Personalization** - Detailed placement of items such as hanging pictures and draperies, organizing drawers and bookshelves, and make decorating and display suggestions.
- **Disposal** - Remove and dispose of all boxes and packing material.

ADDITIONAL SERVICES

RESALE PREPARATION & STAGING

If you plan to sell or rent your home or condominium, Pathway Senior Movers can prepare you with partial or full interior home staging. We provide you with the steps necessary to make your home memorable, so that you can sell it faster and perhaps get a better price.

HOME CLEANOUT

A home cleanout may be the final activity before a home can be sold or rented. Trust Pathway to find the next best home for your things.

- **Selling** - We offer either an estate buy-out option or a 50/50 consignment split through our sister company, Pathway Market.
- **Donations** - We will pack your donations and arrange for drop off or pick up from verified, worthy non-profit charitable agencies.
- **Shipping** - We will find the most economical way to pack and send items you would like to give to family and friends.
- **Recycling & Hauling** - The items that cannot be donated will be recycled or disposed of in the eco-friendliest manner possible.



FREQUENTLY ASKED QUESTIONS

Q What makes a Senior Move Manager different from a moving company?

A Senior Move Managers provide a multifaceted approach to the move process from space planning in the beginning to post-move support and advocacy. Senior Move Managers are responsible for creating and executing a seamless action plan, customized to the client's wishes.

With the gentle and expert guidance of an experienced Senior Move Manager, older adults and families make the key decisions without the emotional and physical distress that can follow. As a result, they avoid the costly mistakes and remorse that often accompany such major lifestyle transitions.

Q How much does it cost to downsize and relocate?

A Pathway Senior Movers offers a free consultation to help understand your moving requests and needs. A customized plan is created at NO charge with an estimate for the entire project after each consultation. We will provide an estimate based on the complexity of each project and moving requests as follows:

- Sorting, organizing, shipping
- Donation, trash removal, floor plan design
- Arrangements for estate liquidation, realtors
- Coordination of our moving team for loading, transport and unloading
- Clean-out services, prepare house for sale
- Unpacking, complete residence set-up

Q What if I only need a little help?

A Whether you need a little help or want us to do everything for you, Pathway Senior Movers is right for the job. Just let us know what you want and/or don't want, and the estimate after the free consultation will reflect your desires.

Q What can I take with me and how will I know what will fit?

A It varies, depending on the unit into which you will be moving. Pathway Senior Movers will get the floor plan for your unit or create one if unavailable. We photograph and measure your belongings and create a floor plan that shows precise placement of your belongings in your new home. We also make recommendations based on your safety and comfort in your new home.

Q What do I do with the rest of my belongings?

A This is a very troubling issue for many clients. The first step is to inventory your belongings and determine which items, if any, you want to give or offer to your family members. Thereafter, items of considerable worth are best to be sold or placed on consignment at Pathway Market. Less expensive items can be donated to charity, yielding a tax deduction.

There are always items that simply need to be discarded. Pathway Senior Movers has the experience to make this process, seemingly daunting at first, a smooth transition.

MOVING PREP LIST

GETTING A MOVE ON

Like many things, transition is much easier when you have a plan.

Pathway Senior Movers will help you do just that.

First, we'll figure out what you need to do to get ready. Then, you decide where you can use our help.

We'll do as much or as little as you would like.

Over the next few pages you will find our moving prep list. Even if you don't have a moving date yet, it's not too early to start planning. Breaking your tasks into small, manageable pieces will help you make progress and keep you from becoming overwhelmed.

Look over our moving prep list now and check off services we can help you with.

8 - 12 WEEKS BEFORE THE MOVE

- Create a master move calendar with all important dates
- Interview real estate agents
- Select moving day
- Interview and schedule movers
- Hire professional appraisers
- Hire handyman to get house prepped for sale
- Take pictures of the house the way it is now before the move

- Make a list of everything you want to bring with you
- Design a space plan for the new house to determine what will fit
- Order new furniture and arrange for delivery to new home
- Coordinate furniture re-upholstery or cleaning
- Coordinate rug cleaning
- Decide what items will be stored, consigned, sold or donated
- Make arrangements for storage, consignment or donation
- Organize estate sale
- Start packing up the house
- Keep a list of packed items/box contents
- Keep adult children in the loop

4 WEEKS BEFORE THE MOVE

- Begin composing a list of people/companies to notify with change of address (see page 20)
- Notify magazines now
- Arrange for change of insurance coverage
- Start using up frozen foods and cleaning supplies
- Arrange final clean-up/hauling
- Make sure paint colors, floors, cabinetry, counters are as you like at new house
- Bring in contractors to make necessary changes
- Choose and order window treatments

MOVING PREP LIST cont.

2 WEEKS BEFORE THE MOVE

- Send out change of address forms
- Order new checks from your bank
- Notify utility companies of your move (see page 20)
- Arrange for new service at your new home to begin on move in day
- If you live in an apartment/condo, reserve the elevator for moving day
- Contact charities for final donation pick up
- Have family/friends pick up their items

1 WEEK BEFORE THE MOVE

- Have new home deep cleaned
- Clean out refrigerator and freezer
- Put jewelry, small valuable items, and important papers together
- Walk through your house to make sure all repairs have been made
- Think about what you will want in your personal suitcase (not packed)
- Arrange for extra trash pick up
- Pick up dry cleaning or items left at local shops
- Notify Life-Line alarm companies and notify them of the move and ask for their procedures for moving day

MOVING DAY

- Take your personal items (jewelry, papers, medicine) and your packed suitcase
- Move cars to make room for the moving trucks
- Have moving contract on hand
- Oversee movers at old house
- Have floor plan for new house available
- Meet movers at the new house and show them where things go

MOVING IN

- Unpack boxes
- Connect TV, computers, phone and internet
- Arrange kitchen, bedrooms, bath, living room and office
- Hang pictures
- Make necessary safety modifications
- Review room arrangements to floor plan
- Organize closets and bookshelves
- Unpack and organize refrigerator and freezer
- Add accessories, finishing touches

welcome
HOME

RECORD RETENTION

The “file purge” is a sensitive (and somewhat scary) issue for many, because there could be negative consequences if you toss something that you should have kept.

How long should the files be kept? Generally, the files should be kept as long as they serve a useful purpose or until all legal and regulatory requirements are met.

These are general-purpose record retention guidelines. If you have unusual or extenuating circumstances in your life please check with your accountant or attorney before discarding any important legal, business, or financial paperwork.



KEEP UNTIL WARRANTY EXPIRES OR CAN NO LONGER RETURN OR EXCHANGE

- Sales Receipts (unless needed for tax purposes, then keep for 3 years)

KEEP FOR 1 MONTH

- ATM Printouts (when you balance your checkbook each month throw out the ATM receipts)

KEEP FOR 1 YEAR

- Paycheck Stubs (dispose of once you have compared to your W2 & annual social security statement)
- Utility Bills (dispose of after one year, unless you're using these as a deduction [like a home office] - then you need to keep them for 3 years after you've filed that tax return)
- Canceled Checks (unless needed for tax purposes and then you need to keep for 3 years)
- Credit Card Receipts (unless needed for tax purposes and then you need to keep for 3 years)
- Bank Statements (unless needed for tax purposes and then you need to keep for 3 years)
- Quarterly Investment Statements (keep until you get your annual statement)

RECORD RETENTION cont.

KEEP FOR 3 YEARS

- Income Tax Returns
 - The IRS can audit you for no reason, up to three years after you've filed a tax return. If you omit 25% of your gross income that goes up to 6 years, and if you don't file a tax return at all, there is no statute of limitations
- Medical Bills and Canceled Insurance Policies
- Records of Selling a House (documentation for Capital Gains Tax)
- Records of Selling a Stock (documentation for Capital Gains Tax)
- Receipts, Canceled Checks and other Documents that support Income or a Deduction on your Tax Return
 - Keep 3 years from the date the return was filed, or 2 years from the date the tax was paid - whichever is later
- Annual Investment Statement
 - Keep 3 years after you sell your investment

KEEP FOR 7 YEARS

- Records of Satisfied Loans

WHAT TO HOLD WHILE ACTIVE

- Contracts
- Insurance Documents
- Stock Certificates and Records
- Property Records
- Records of Pensions and Retirement Plans
- Property Tax Records Disputed Bills
 - Keep the bill until the dispute is resolved
- Home Improvement Records
 - Hold for at least 3 years after the due date for the tax return that includes the income or loss on the asset when it's sold

KEEP FOREVER

- Marriage Licenses
- Birth Certificates
- Divorce Documents
- Wills
- Adoption Papers
- Death Certificates
- Records of Paid Mortgages

CHANGE OF ADDRESS

HOW TO CHANGE YOUR ADDRESS

Changing Your Address with the United States Postal Service (USPS):

ONLINE

Go to <https://moversguide.usps.com/mgo/disclaimer>. The step-by-step process will require the following information:

- Permanent or temporary (under 12 months) move
- Your full name and the names of any family members who are moving with you (a separate form will be required for each member with a different last name)
- A debit or credit card for the verification fee used by USPS to verify address information (to avoid the verification fee - visit your local post office and fill out the #3575 form in person)

BY PHONE

Request the form by phone. You can contact your local post office and request a #3575 form to be mailed to you. The number for the USPS is 1-800-275-8777. You will have to pay the verification fee if you choose to change your address over the telephone.

IN PERSON

Fill out the #3575 form and return it in person to the post office. By going into the post office, you will avoid paying the service fee required for telephone and online conveniences.

CHECKLIST: WHO TO NOTIFY OF ADDRESS CHANGE

UTILITIES

- Gas and Electric
- Phone, Cable, and Internet
- Water

SERVICES

- Cleaning
- Garbage and Recycling
- Lawn Care
- Post Office
- Snow Removal

MEDICAL

- Doctor
- Pharmacy
- Home Health Care Provider
- Dentist
- Medicare & Supplemental Health Insurance Carriers

MEMBERSHIPS

- Clubs and Organizations
- Magazines and Subscriptions
- Newspaper
- Place of Worship

FINANCIAL

- Accountant
- Auto Insurance
- Bank Accounts
- Credit Cards
- Homeowner's Insurance
- Investments
- IRS
- Life Insurance
- Loan Providers
- Pension
- Safety Deposit Box
- Social Security

LEGAL

- Lawyer
- Secretary of State - Driver's License
- Voter Registration

OTHER

- Friends and Family
- Library
- Online Shopping Sites
- Veterinarian

PATHWAY MARKET

As a client of Pathway Senior Movers, you will have an exclusive opportunity to sell your extra and unwanted items at Pathway Market! We offer either a **buy-out estate** option or a **50/50 consignment split**.

WHERE IT ALL BEGAN

Pathway Senior Movers created the sister company, Pathway Market as a vital resource for our seniors that we assist in downsizing and/or moving. Some of our moving clients consign items to help them create extra income.

Our impressive consignment warehouse provides a massive showroom, accommodating customers' shopping needs with unique pieces and fair prices.

WHAT TREASURES WILL YOU FIND?

At Pathway Market, we provide shoppers with a wide variety of ever-changing inventory and a high turnover rate. We have furniture, home decor, kitchenware, and more! Our sales associates are knowledgeable and happy to assist you in finding the right item at the right price to fit your shopping needs.

AVERAGE VALUATION OF GOODS

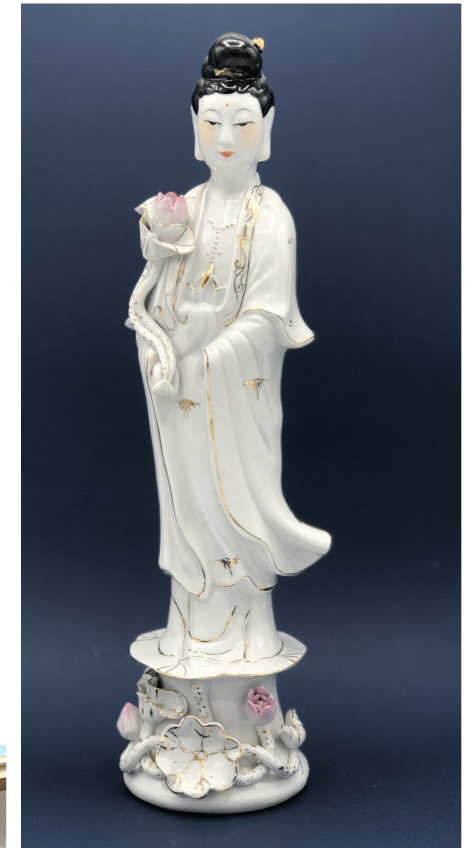
All items are priced at fair market value. Some items are in low demand (e.g. entertainment centers, pianos, china cabinets) and have a lower chance of selling during the 90-day consignment period. Pathway agrees to try to sell all products to the best of its ability.

Non-salable products will be donated or responsibly disposed of:

- Broken/Damaged/Torn/Stained
- Electronics exposed or corroded
- Used mattresses
- Paint or varnish
- Chemicals/cleaning supplies
- Clothing
- Used candles
- Warped or damaged wall art
- Medical equipment
- Food

“ I love knowing that I can rely on Pathway Senior Movers to take care of all of my moving needs and use Pathway Market to make some money on the items I can't take with me. ”

- Betty R., Grand Rapids, MI



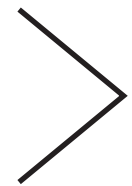
Downsizing Strategies

It likely took 10 – 20, even 30 years to accumulate what you have. This is a lot to purge. Downsizing is an ongoing process and could take months to complete. Do not jump into this blindly, having a plan is going to keep you on track!

TIPS & TRICKS TO TRAVELING LIGHT

Ask yourself these three questions to guide you in this process:

- Do I use it?
- Do I need it?
- Do I love it?



**If the answer is “NO”
Get rid of it!**

GETTING STARTED

- Give yourself ample lighting and workspace
 - Be sure you have an area large enough to hold what you are going through. This space should not be a part of your everyday activities, so you can leave an unfinished project for another day.
- Utilize your supplies effectively
 - Use heavy duty bags for donations and trash items. These bags can be used for clothing, linens, pillows as well as your trash. Use cheaper boxes for your donation items, saving the sturdier boxes for the items you are taking with you.
- Plan out tasks according to the weather
 - Do not work in your attic on a scorching day in July, and do not work in your garage in sub-freezing weather.

THE 80/20 RULE

They say we wear 20% of our clothing 80% of the time. The same can be said about other aspects of life. This rule makes it easier to understand that we can downsize and still be ok! This is where you can use your sorting piles: keep, donate, undecided.

- Clothing
 - If you have not worn the piece of clothing in the last 12 months, donate it.
- Books
 - If its not one you have knowledge of and have not dusted it off in the last 12 months, donate it.
- Garage Items
 - You likely have back up items, just in case. Test all items to see if they even still work. If it doesn't have its own place (shelf, tool drawer, etc), donate it.

LESS IS BEST

If you are selling your home, space can make a deal OR break a deal! Clutter tends to make a house look smaller than it is. Downsizing before putting your home on the market increases salability!

For all the items that you can **happily** part with, consider your options:

- Family
- Friends
- Church
- Donation
- Estate Sale
- Pathway Market Consignment or Estate Buy-Out

DOWNSIZING STRATEGIES cont.

DEVELOP A SORTING PLAN

WHAT WORKS BEST FOR YOU?

- Color Coded Dot Labels
 - Pathway provides colored dots that correspond with our Dot Matrix on the next page.
- Post-It Notes
- Computer Spread Sheets or Legal Pad Lists
 - Pathway uses inventory sheets for items you wish to consign at our Pathway Market.
- Pictures of Possessions
 - Taking pictures of your possessions and sharing with family will allow them to determine what they would like to keep!
- Make Piles (keep, donate, and undecided)

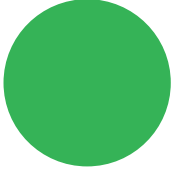
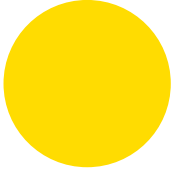
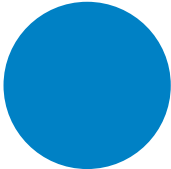


You ARE allowed to change your mind, and you can expect to change your mind several times throughout this process.

Don't be afraid to ask for help.

pathway

DOT MATRIX

As a client of Pathway Senior Movers, we will provide you with colored dot labels to help you organize and make decisions on where to send your things.

-  **GREEN** - New Home
-  **YELLOW** - Donate
-  **BLUE** - Family
-  **RED** - Sell
-  **ORANGE** - Storage

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