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## THE PEOPLE WHO DO IT ALL

### MOVING MANAGEMENT FOR SENIORS. HAVE YOU HEARD OF IT? NEITHER HAD WE!

We often find ourselves having conversations with clients making a transition who have not moved in decades or with adult children who are helping their parents with this major undertaking. The organizational and physical tasks associated with planning and implementing such a complex move can be overwhelming for the entire family. In one of these recent conversations, our clients mentioned they were feeling overwhelmed with the daunting task of parting with items in the house and garage that they had collected over the last 30+ years. They have adult children who are encouraging a move, but have busy lives and don't live in Kelowna, so it's difficult for them to be helpful. Ultimately our clients learned of a service in Kelowna that is trained to help seniors with this major transition. We had never heard of this service before and thought it might be interesting to do a little bit of research and share that information with you in this newsletter. It turns out there is a National Association of Senior Move Managers.

Senior move management is the profession that assists older adults and their families with the emotional and physical aspects of relocation and/or "aging 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.

Although specific services vary, most Senior Move Managers® can help with some or all of the following:

- *Developing an overall move or "age in place" plan*
- *Organizing, sorting and downsizing*
- *Customized floor plans*
- *Arranging for the profitable disposal of unwanted items through auction, estate sale, buy-out, consignment, donation, or a combination of the above*
- *Interviewing, scheduling and overseeing movers*
- *Arranging shipments and storage*
- *Supervise and oversight of professional packing*
- *Unpacking and setting up the new home*
- *Related services, such as cleaning, waste removal, shopping, senior escort, assisting with selection of a realtor and helping prepare the home to be sold.*

Some Senior Move Managers® provide these services directly; others function in more of an oversight or management role. 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 expert organizational skills and solid knowledge of "aging in place" concepts.

## WHY IS SENIOR MOVE MANAGEMENT NEEDED?

- 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® emerged to fill these gaps and to facilitate the transition for everyone involved.
- Older adults making a transition have usually not moved in 30, 40 or 50 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.

The information provided in this newsletter was sourced from the National Association of Senior Move Managers website ([www.nasmm.org](http://www.nasmm.org)). We did discover [www.movelady.com](http://www.movelady.com) as a local service for those of you in the Kelowna area.

## Market Pulse:

Major Stock Indexes	Level/Price	YTD Return Ending Feb 28th/19
S&P/TSX Comp	15,999	11.70%
S&P 500 Comp	2,784	11.08%
Dow Jones Industrial Avg	25,916	11.10%
Major Bond Index		
Dex Universe	1,069	1.68%
Commodities		
Crude Oil - WTI (US\$/bbl)	\$57.10	25.74%
Gold (US\$/oz.)	\$1,307	2.03%
N. Gas (US\$/MMBtu)	\$2.81	-4.35%
Currency		
Canadian Dollar (CAD/USD)	\$0.76	3.14%

Source: Bloomberg.

## Personal Updates:

Lori spent the month of February hibernating in her new home and entertaining many friends from Kelowna and Calgary. She has been spending time at the gym and stretching out in yoga. Lori is on the planning committee for a fundraising group called 100 Heroes which raised approximately \$45,000 in February for local charities and she is on the planning and fundraising committee for the Kelowna Art Gallery and the Raymond James Christmas in November.

As much as Jay and the family have enjoyed all of their winter activities (skiing, cheerleading, dance, hockey), they are definitely looking forward to spending spring break in Maui. Hopefully by the time they get back to Kelowna, spring will be in full force as there are a couple major events that Jay needs to get training for. 2019 will mark the sixth year Jay will be participating in the [Ride to Conquer Cancer](#) benefiting the BC Cancer Foundation. Jay has personally raised over \$55,000 and the entire Team Raymond James has raised over \$460,000! Back in 2017, Jay and a few other riders took on the challenge of cycling across BC. The goal for this year will be to ride across Alberta over the course of four days between June 14 – 17. Stay tuned...

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