

# *Moving Checklist*

## *SilverOak Wealth Management LLC*

*Financial Advice for Life*





**Eight Weeks Before**

- 1) If you are moving because of a job transfer, understand your company's moving policy.
- 2) Create a budget for your move.
- 3) Create a moving binder/electronic folder to hold moving-related paperwork and expenses. Can be used for tax credits and claims.
- 4) Make a household inventory to track what you are moving, what you are discarding and what is being left behind.
- 5) If using a mover, get estimates and choose a moving company. Verify proper insurance, licenses and company history. Consider scheduling a walk-through with the moving company.
- 6) If moving yourself, contact truck rental companies for estimates.
- 7) Begin removing clutter. Start with basement, attic and garage. Consider having a garage sale, donating to charity or selling items online.
- 8) Prepare for your new home. Contact painters, carpenters, plumbers, locksmiths, etc.
- 9) Obtain/Create a floor plan of your new home for furniture placement.
- 10) Contact your insurance agent to determine if you will need additional coverage for the move.
- 11) Arrange to transfer school records.
- 12) Arrange to transfer medical, dental and legal records and seek referrals.
- 13) Take pets for immunizations, if necessary, and arrange to have veterinary records transferred.
- 14) Prepare to transfer financial and safety deposit box contents to new bank or branch.

- 15) Be sure all personal, family and financial records are accounted for:
  - Birth certificates, marriage licenses, Social Security cards, passports, insurance, medical, dental, legal and academic records
  - Obtain missing documents
- 16) Store your important documents and records in a locked, fire-proof safe or safety deposit box.

## Six Weeks Before

- 1) Arrange for flights and other travel arrangements for family and pets.
- 2) If using a mover, schedule with moving company.
- 3) If moving yourself, reserve moving truck and contact friends/family to help or hire a moving team.
  - Consider parking of moving truck. Make sure it can fit in your driveway or street and that the distance from the truck to your front door is within the company guidelines so there are no long carry charges.
- 4) Make arrangements for storage, if necessary.
- 5) Order moving supplies: boxes, packing materials, tape, markers and labels.
- 6) Begin packing to avoid stress of packing everything last minute. Do one room at a time and pack bedrooms and essential kitchen/personal items last.
- 7) Clearly label each box with its contents and the room it's destined for in your new house.
- 8) Begin using perishable food and supplies that cannot be moved.
- 9) Prepare antiques and collectibles for special moving care.
- 10) Get antiques, jewelry or other valuables appraised.
- 11) Take pictures of furniture and expensive items.
- 12) Obtain and fill out post office change of address cards, or do online. Have mail forwarded.
- 13) File Change of Address Form 8822 with the IRS by calling (800) 829-1040 or visit [www.irs.gov/faqs/irs-procedures/address-changes](http://www.irs.gov/faqs/irs-procedures/address-changes)
- 14) Shop and compare services you will need in your new home such as cable, internet and security companies.

## Four Weeks Before

- 1) Put together a contact list and start sending new address notifications. Make sure to include insurance agents, credit card companies, banks, financial advisor, magazine subscriptions, friends and relatives.
- 2) Schedule all utilities and services at old home and new home.
  - Cable
  - Internet
  - Telephone
  - Electricity
  - Gas
  - Water
  - Sewer
  - Trash / recycling
  - Lawn services
  - Irrigation services
  - Pest control
  - Security systems
  - House cleaning services
- 3) Contact insurance company for moving coverage and to transfer policy to new home.
- 4) If you live in a high-rise condo or apartment, reserve elevators for move and see if permits are required.
- 5) Arrange for cleaning or repair of drapes, furniture and carpets.
- 6) Arrange and schedule cleaners to clean your home after you have moved your household items out.
- 7) Begin dismantling outside furniture and children's play sets if you are moving them.
- 8) Begin packing your garage and/or shed.
- 9) If you are moving plants, plan a safe and secure way of transporting them.

## Three Weeks Before

- 1) Properly dispose of hazardous household chemicals such as paints, cleaners, propane and other flammables.
- 2) Recycle electronics, plastics, metals, papers, etc.
- 3) Arrange for childcare and pet care for moving day.

- 4) Prepare automobile and driver's licensing and registration if moving out of state. Notify your local department of motor vehicles of your address change. Go online or call to register your vehicle in your new state.
- 5) Transfer prescriptions to a pharmacy near your new home. Be sure to have enough medication on hand.
- 6) Call your insurance company to transfer your current home coverage and get pricing on your new home.
- 7) Start a file for new homeowner including maintenance history and manuals.

## Two Weeks Before

- 1) Arrange and prepare for sale, donation or disposal of remaining unwanted items.
- 2) Ensure all newspapers, magazines and other subscription services are cancelled or forwarded to new address.
- 3) Notify all creditors of move.
- 4) Service and clean out automobiles before move.
- 5) Pick up laundry and dry cleaning.
- 6) Finalize schedule for moving day, especially if closing on a new home same-day. Consider timing of movers, child/pet care, documents signing, etc.

## One Week Before

- 1) If using a mover, confirm date and time of packing and moving.
- 2) If moving yourself, confirm moving truck and anyone helping out (friends, family, moving team).
- 3) Back up your computers. Create a box of warranties and user manuals.
- 4) Pack a travel kit and put aside critical items beforehand:
  - Financial: check book, credit cards, cash, traveler's checks, foreign currency, etc.
  - Travel: passports, birth certificates, driver's licenses or ID cards, keys, tools, moving papers
  - Baby Care: diapers, stroller, car seat, medications, clothing
  - Children: toys, medication, books, clothing
  - Kitchen: dishes, utensils, food
  - Personal: bedding, toiletries, medicine, first aid kit
  - Pack a suitcase: have clothing and other essential items on hand in case movers are delayed
  - Cell phones and chargers
  - Scissors, tape, paper towels, toilet paper, flashlights, trash bags

- 5) Pack remaining non-essential items.
- 6) Settle any bills with local businesses.
- 7) Defrost refrigerator and freezer.
- 8) Drain oil or gas from power equipment and drain water hoses.
- 9) If moving appliances, disconnect and prepare them for the move.
- 10) Confirm hotel or accommodations.

### One Day Before

- 1) Ensure vehicles have gas and make sure to have plenty of cash on hand for the move.
- 2) If using a mover, let movers pack your belongings.
- 3) Have several copies of directions to your new home and your contact information printed out for movers.
- 4) Confirm arrival time of moving truck.
- 5) If moving yourself, dismantle beds and large furniture and finish packing.
- 6) Set aside travel kit and other important items including fire-proof safe containing your personal records.
- 7) Pack a “load last” box which are items that will be needed first in your new home.
- 8) Pack up your computer and all electronic devices. Before unplugging, take pictures to help with reconnecting them in your new home.
- 9) Check-in to flight if flying. Ensure possession of all necessary travel documents.

### Moving Day – Old Home

- 1) Drop off kids and pets at pre-arranged care site.
- 2) Confirm bill of loading and inventory before signing. Keep forms in a safe place.
- 3) Clean house if you have not hired cleaners.
- 4) Double check washer/dryer, refrigerator and freezer for items left behind.

- 5) Check outside and in garage/shed for any overlooked items.
- 6) Unplug appliances that are being left behind.
- 7) Make note of all utility meter readings.
- 8) Remove and dispose of garbage.
- 9) Switch off the lights.
- 10) Do a last sweep of every room, making sure to check closets, cabinets, and drawers.
- 11) Lock windows and doors, including any garages or sheds.

### Moving Day - New Home

- 1) Have map of your new home available and tape names to doors to assist movers.
- 2) Be available to answer any questions.
- 3) Supervise loading and unloading of belongings.
- 4) Check boxes and belongings. Note any damage on the inventory record.
- 5) Pay the truck driver and tip moving team, if applicable.
- 6) Locate fuse box and main water valve.
- 7) Connect major appliances and make sure water heater is on.
- 8) Locate and unpack essentials first.
- 9) Consider any immediate needs, such as groceries or other household supplies.

### Odds & Ends

- 1) Thoroughly inspect new home.
- 2) Install new batteries in smoke and carbon monoxide detectors in new home and ensure that they are working properly.
- 3) Check fire extinguishers in your new home.
- 4) Consider having locks re-keyed.

- 5) Write down the readings of the electricity and water meters of new home.
- 6) Check on license requirements for pets.
- 7) Register to vote. You can do it quickly at [www.eac.gov/voter/national-mail-voter-registration/form](http://www.eac.gov/voter/national-mail-voter-registration/form).
- 8) Contact new affiliations such as churches, clubs, and associations.
- 9) Transfer all financial and safe deposit box contents to new bank or branch.