August 20, 2023 – SFC Aging Well Discussion Group Joan McCreary, JMPO Certified Professional Organizer

Downsizing & Organizing: How's, Why's and What to do with Stuff

Background:

Certified Professional Organizer – to organize and make sense of stuff, not about getting rid of or moving as the priority.

Started in medical devices career, then became a stay-at-home mom, then was working 30hrs/week at a charter school. Found organizing and discovered it utilized project management skills, understanding of learning, and nurturing skills that had been developed. Her business grew as her kids grew and needed less from her, and now JMPO does residential or estate organizing with 1-1 support or a team of organizers to provide what is needed – logistics or emotional components.

Story:

Friend overwhelmed with paper in the 'baby's room'. She and her husband had been trying to adopt for 5 years. The overwhelm was not actually about the paper but her sadness/loss/internal struggle.

Organizing is not a one-time thing – things come into our lives in all sorts of ways – always need to organize paper (mail), gifts, souvenirs.

Chronic Disorganization: people who cannot organize things that come in. Spaces are not used for their purpose (stove as a counter, bathroom as a storage closet)

Hoarding: mental health condition

Story:

Moved stepdad from 5-bedroom house into mom's house, which was smaller. He was a collector of papers – full office, full basement – 4-year event of clearing out. Parents grew up in depression and mom kept everything – every dress, every bag from the store. *Why we keep things almost does not matter – it is HOW do we deal DAILY with our stuff that matters.

In the moment you are deciding how to deal, WHY can be important –

ask 5 why's...tool to get to the core element of a matter.

Must be asked with a drive to understand, not judgement.

Ex: Why? I don't want it to go in the thrash.

Why? You are throwing my memories in the trash...keep asking why until you reach the core.

Great Book: Vickie Dellaquila "Don't Throw My Memories in the Trash"

Find an alternative to trash:

-recycling (Safeway and Lucky have county program for thin plastic and bubble wrap)

CANNOT get rid of someone else's stuff – very damaging to relationship do, independence and respect are key. Only exception: complete diagnosis of dementia

Good first step – Check if estate documents are up to date.

- Documents help people to make decisions for you when you cannot that are in line with your wishes.
- Protect you so only those you want and when you want will make decisions.

#1 reason to push to make changes: Health and Safety

Ex: dolls on the floor that are a tripping hazard but does not want to get rid of them. Possible solution – move dolls to unused guest bed so no longer a hazard. Solves the safety issue.

"How to Say it to Seniors" by David Solie – wonderful book to help close the communication gap – speaks to the human development component of aging.

Different stages have different needs:

Teenagers want to break free, Senior adults want legacy (what leaving behind) and control (how to stay independent when losing control)

When talking with a senior –

- 1) Talk about it If transparent, gives senior chance to make choice independently but informed of your concerns.
- 2) Talk about alternatives make a safety plan ex: grandma watering 40-acre garden chooses to wear an alarm while gardening so can get help if it is needed.

Hire someone to help if you get stuck – non-judgmental support (anyone emotionally connected will have judgement involved)

If moving – getting rid of paper is a big deal – see State requirements to know

Ways to keep things out of trash:

- 1) Give to kids must be done with no strings attached.
- 2) Give to charity check jmpoestate.com for listing on how to get rid of different things. (Resale of antiques is bad but can get rid of things for free like furniture, linens, etc.)

It is a gift to yourself and your family to take care of stuff yourself.

Ex: One older woman without family donated her house and all the stuff in it to Salvation Army

Q: What is best thing to get kids to come and take their stuff?

1) Let them know what it is and give them a week to decide – hold to your deadline and give it to them in a week or get rid of it – text a picture to keep it simple or to ask if it is theirs in the first place.

Q: What do you do with meaningful cards: Choose a representative # of cards (3-5) and let the rest go

Q: How get rid of sentimental clothing – same as above, choose representative sample/what can fit

Q: How do you deal with photographs? Get rid of landscape photos first, get rid of ones you do not know who they are in the picture, keep a representative sample of people you know (20? Of each person) _

1) Frameo – can upload pictures and rotating photo album plays.

Start with letting go of what you know you do not want

Piling papers - baskets or trays allows things to be cleaned up or moved more easily

"Containerizing" – condiments, papers, etc. – is a powerful organizational tool

If stuck – hire a professional

Platinum Senior Network – excellent, trustworthy resources (all business professionals) and many are free



Daily Money Management

Pamela Gordon Clear Path Advising, LLC www.clearpathadvising.com pam@clearpathadvising.com (949) 463-4868

Financial Planning

Troy Beck Heart of the Valley Wealth Advisors www.thrivent.com/HOTVwealthadvisors troy.beck@thrivent.com (408) 217-2934

In-Home Care Services

Markus Breitbach Help and Care www.HelpAndCare.com support@helpandcare.com (408) 384-4412

Medicare Specialist

Raghu Yadavalli Health Plan Advisor, CA License #0M34203 raghu.yadavalli@gmail.com (408) 705-3581

Move Management & Estate Sales

Sharon Catalan Caring Transitions www.caringtransitions.com scatalan@caringtransitions.com (408) 229-2298

Professional Organizer

Joan McCreary, CPO JMPO ~ Estate & Home Organizing www.JMPOestate.com joan@jmpoestate.com (408) 896-6262

Real Estate Broker

Kirsten Reilly Compass DRE #01383856 www.kirstenreilly.com kirsten.reilly@compass.com (408) 835-2962

Reverse Mortgage

Michele Morse Reen NMLS #304120 DFPI License #01136905 The Reen Team at Direct Mortgage Funding michele@reenteam.com (408) 813-4729

Senior Fitness Consultant

Deborah Rothschild, M.S. Virtual & On-Location Private and group fitness training Tough Agers LLC www.deborahdoesfitness.com (408) 367-3247

Senior Living & Housing Advisor

Mike Scoggin Oasis Senior Advisors Silicon Valley www.OasisSeniorAdvisors.com MScoggin@YourOasisSeniorAdvisors.com (650) 933-3336

Tax Preparation Services

Sandy Sparkman Enrolled Agent & Certified Senior Advisor, Green, SRES, Certified Probate & Trust Specialist DRE #01358679 Sparkman & Company Tax Preparation & Resolution Services www.sparkmanandcompany.com sandy@sparkmanandcompany.com (408) 533-0022

Trust & Estate Administration

Susan Brooksbank (CLPF #1135) Fiduciary Accounting Brooksbank Fiduciary Services www.brooksbankfiduciary.com susan@brooksbankfiduciary.com (408) 904-8139