MOVE MANAGEMENT

PROFESSIONAL ORGANIZING

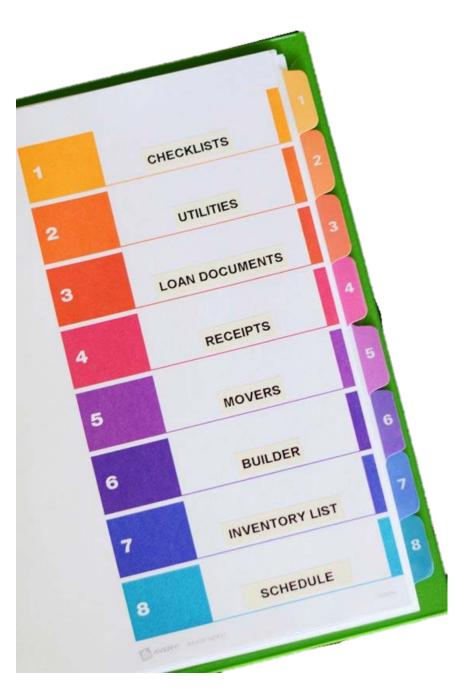
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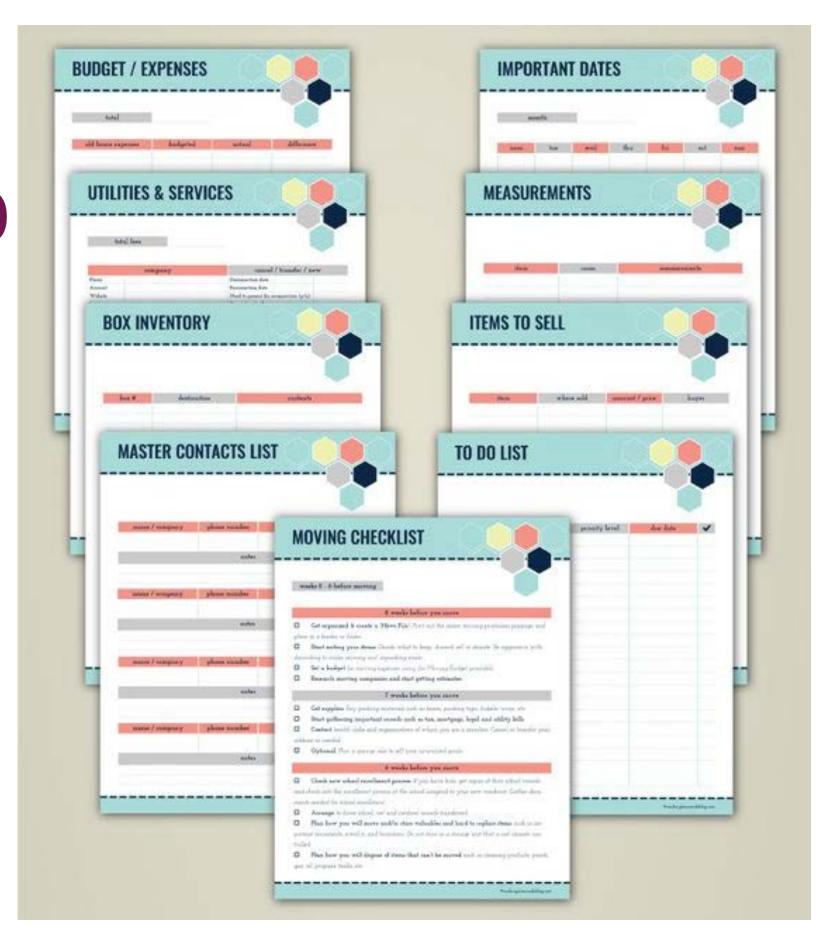
HOME & ESTATE CLEAN-OUT



be

# **ORGANIZED**



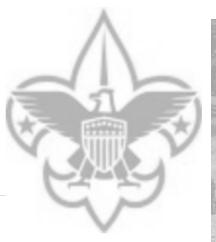


# rightsize with our "GOT STUFF" QUESTIONS











Jacobs Ladder Job Center, Inc.

# CVAN



# SUPPORT THE COMMUNITY

with creative donating















# Documents for **safe keeping**

# **LIFE EVENTS**

Birth Certificates
Death Certificates
Marriage Licenses
Divorce Papers
Adoption Papers
Citizenship Papers
Veterans Documents
Passports

# **ESTATE PLANNING**

Will Letter of Instruction Trust Documents Burial Plot, Funeral Arrangements Power of Attorney/Guardianship

# **BANK ACCOUNTS**

List of Bank and Investment Accts List of Safety Deposit Boxes

# **PROOF OF OWNERSHIP**

Housing, Land and Cemetery Deeds
Escrow Mortgage Accounts
Proof of Loans, Debts, Mortgages Owed & Paid
Stock Certificates, Bonds, Brokerage Accounts
Partnership & Corporate Operating Agreements
Vehicle Titles

## PASSWORDS & USER NAMES

Utilities
Credit Cards
Bank Accounts
Social Media
Electronics
Websites
Medical Providers

# RETIREMENT

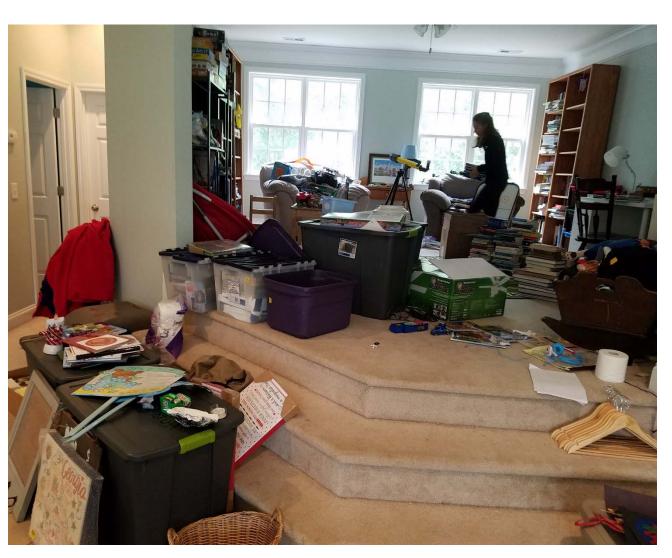
Social Security IRA 401(k) Accounts Pension Documents Annuity Contracts

# HEALTH CARE

Personal and Family Medical History
Durable Health-Care Power of Attorney
Authorization to Release Health-Care Info
Records for Major Medical Events
Living Will
Do-Not-Resuscitate Order



# gather critical DOCUMENTS





before and after

# STAGE for a house that CALMS

Clean - Appealing - Livable - Minimal - Straight













# Build a move TEAM











# start PACKING now!



MOVE MANAGEMENT

PROFESSIONAL ORGANIZING

chaostocalm

HOME & ESTATE CLEAN-OUT



# Looking for opportunities to educate your team?

We offer FREE 15-45 minute sessions designed specifically to provide your team with useful information they can share with their clients. Using experience gained from managing hundreds of moves, we've developed fun courses full of real-life advice, techniques, and tricks for making the entire moving process easier and less stressful.



# Floor Planning 101

Will your client's furniture fit in your new home? Learn the basics of how to create custom floor plans along with designer tricks for maximizing space and functionality.



# Repurpose, Resell & Donate

Clients have perfectly good things they're reluctant to throw away? Let's get creative! Come find new uses for items, options for selling, and local resources for donating and recycling.



# Successful Staging

matches required!

Paperwork Paralysis?

Homes that are beautifully staged command higher prices and sell faster. Learn the "CALM" system to turn your house into one buyers can't wait to live in.

Got Stuff? Let's "Right"Size!

Sellers overwhelmed because of

have too much stuff? Join this fun

Learn the "Five A" system for getting

control. This foolproof method makes

(and keeping) paperwork under

conquering piles easy work. No



# Moving?

Tools to help plan and execute a smooth transition from one home to another. Get planning tools and advice guaranteed to save time and



exhaustion.

"RightSizing" without stress or

Hiring The Right Mover With hundreds of choices, how do you choose the right moving company? We'll review roles and responsibilities, common terminology and the questions to ask so you con confidently hire the right team.



# Packing Like a Pro

Learn tricks and techniques for safely and efficiently packing. Demonstrations by professional packers will include real-life examples of basic and complex household items.



## Move Management

Clients feeling overwhelmed by the massive amount of work moving creates? A move manager can provide tools and services that will make moving easy. Learn who they are and what they can do for you.



## **Custom Courses and Sessions**

We are happy to uses our experience and resources to create an educational and fun session on a topic of your choice.





# Let's Get Moving! A Checklist for Hiring the Right Movers

We've all heard a frightening tale of a move gone bad; movers that don't show, charges way over the estimate, damaged items, or even worse - hijacked prized possessions. There is no doubt that having a reliable, trustworthy moving company can make the difference between a smooth move and a fist-clenching nightmare. Fortunately, a little work on the front end can almost always help avoid calamity. We've created the checklist below to help you make the best choice.

Ask friends, neighbors, colleagues, and family who have recently moved about their experience. Would they recommend the company they used? Why?

Aim to have three companies to call and compare.

Cyber stalk - this is a time where a little digging can really pay off. Check out the Better Business Bureau (www.bbb.org), the moving company's Facebook page, YELP, Angies List, and any other web-based reviews you can find. Look for recent reviews and if there are negative comments, the way the company handled the situation.

Make sure you're dealing with an actual moving company, not a broker collecting a fee as a middleman.

Confirm the company is registered, insured, and in good standing. Interstate moving companies should have a DOT and Motor Carrier number. To verify which companies are registered and in good standing go to <a href="https://www.FMSCA.gov">www.FMSCA.gov</a>.

Always request a home visit, if they are unwilling or unable to perform one then move on (pun intended!).

Ask a lot of questions....

- How long have they been in business?
- Do they use employees or contractors? (Employees tend to be better.)
- How do they handle damaged items?
- Do they rent trucks or have their own?
- Who will your contact be before, during and after the move?
- Do they charge by the weight, the hour or number of movers?
- If your move is long-distance, what is the delivery window? Will they guaranty the delivery date?
- Will anyone else's belongings be on the truck with yours or will it only contain your items?
- What additional fees or services do they charge for?
- Is there anything they won't transport?
- Do they have availability on the day(s) you need to move?
- Does the estimate include any crating? How will they pack TV's, mirrors and other large or fragile items?
- Is there money due upfront? (Do NOT pay a large deposit or in full upfront.)
- What forms of payment do they accept?
- Is there a cancellation policy?
- Do they have a minimum?
- Will they provide references?

Determine which type of insurance is best for you. Movers offer Basic Carrier Liability, Full Value Protection and Declared Value Coverage (see sidebar). Additionally, you can purchase additional or a policy for certain high-value items.

You should receive a written Estimate, Bill of Lading, Inventory and Order for Service.

Never sign a blank or incomplete document (other than the Bill of Lading which is started at the beginning of the move and finished after delivery).

Don't sign anything "releasing" or "discharging" the movers from their responsibilities.

Look carefully for hidden charges. Things like Fuel Charges, Stretch Wrap Fees, Long Walk/Distance and Large Item Charges can add up and more than double your cost.

Do a final walk through looking for damage prior to approving and signing the final documents.

# MORE INFO

Check out www.ProtectYourMove.gov

There is great information at the Federal Motor Carrier Safety Association's (FMCSA) website at www.FMCSA.dot.gov

A basic Google search will reveal a plethora of information. Here is one we like http://www.movers.com/moving-guides/index.html

# **Understanding Moving Insurance**

## Full (Replacement) Value Protection

This is the most comprehensive insurance option. The initial estimate provided must include this level of protection. Items will be transported with this policy unless the client specifically waives it (see Released Value below). With Full Value Protection if any article is lost, destroyed or damaged while in the mover's possession, the mover will, either 1) repair the article to the extent necessary to restore it to the same condition as when it was received, or pay for the cost of those repairs; or 2) replace the article with an article of like, kind and quality, or pay for the cost of such a replacement.

### Released Value Insurance - Waiver of Full (Replacement) Value Protection

The good news is that Released Value Insurance is free. The bad news is that it offers minimal protection. With Released Value the mover assumes liability for no more than 60 cents per pound, per article. To put that in perspective, a dining room table weighs approximately 100 pounds giving it \$60 of coverage. An Xbox One weighs about 10 pounds and would carry \$6.00 of coverage.

### **Third-Party Insurance**

This is an additional policy that is purchased separately and sits on top of the Released Value coverage. With this insurance, the mover is still liable for 60 cents per pound per item. Any losses above that amount are recovered from the third-party insurance company.





# Why use Chaos to Calm for Your Packing Needs?

General	Chaos to Calm	Movers
Bonded and Fully Insured	✓	✓
Use Only Employees (not contractors)	✓	Some
Able to Accommodate Large Projects with a Team as Large as 10	✓	Some
Perform Thorough Background and Drug Tests and Carefully Vet Employees	✓	Some
Own Moving Trucks and are Licensed to Transport Client Belongings		✓
Senior Certified and Specialists	✓	
Female Owned and Based Out of Charlotte	✓	Some
Packing Services		
Pack boxes to Insurance Standards	✓	✓
Pack in an Organized and Mindful Way with Like Items Together	✓	
Use Color-Coded Labels that Identify Destination Rooms each with a Unique Color	✓	
Write Detailed Content Descriptions on all Boxes	✓	
Neatly Stack Boxes Out of Your Way	✓	
Use Signs on Moving Day to Make Sure Boxes Land In Correct Rooms/Areas	✓	
Label Lamp and Electronics Parts to Assist in Reassembly/Reconnection	✓	
Work at Your Pace and are Focused on Reducing Your Stress Level	✓	
Will Pre-Pack Items to Assist with Decluttering and Staging	✓	
Supplies		
Use Professional Grade Supplies	✓	✓
Deliver and Restock Supplies	✓	✓
Use Labels Easily Visible on Front and Top of Box (rather than write on box)	✓	
Unpacking and Resettling Services		
Remove Contents from Boxes	✓	✓
Put Items Away in a Neat and Orderly Manner	✓	
Remove Packing Supplies	✓	✓
Return to Remove Second Load of Supplies	✓	
Make Beds, Set Clocks, Reconnect Small Electronics, Place Décor, Hang Art	✓	
Wipe/Dust Items as Needed	✓	
Additional Services		
Relationships with Trusted and Vetted Moving Companies with Different Specialties	✓	
Coordinate Storage with Public Facilities	✓	
Assist with Pre-Move Organizing and Rightsizing	✓	
Will List, Box and Deliver Donations and Provide You with a Receipt	✓	
Coordinate Liquidation, Consignment and Auction of Items with Trusted Resellers	✓	



We strongly believe at Chaos to Calm that there is no better gift than to help others. Below is a list of donation facilities that service the greater Charlotte area and beyond. If you have a facility you would like to add to our list, please let us know. We are always excited to find new ways to give back.

# **HOUSEHOLD ITEMS**

AMVETS	amvetsnsf.org	704-393-2359
Catholic Social Services	cssnc.org	704-370-3283
Crisis Assistance Ministry	crisisassistance.org	704-371-3000
CVAN (Battered Women)	cvan.org	704.788.1108
Goodwill Industries	goodwillsp.org	704-987-1920
Habitat for Humanity - Cornelius	ourtownrestore.org	704-896-8957 ext. 120
Habitat for Humanity – Kannapolis	cabarrusrestore.org	704-786-4000
Habitat for Humanity – Salisbury	habitatrowan.org	704-642-1222
Salvation Army	salvationarmycharlotte.org	800-528-0244
Lydia's Loft	lydiasloft.org/	704-948-7797
National Kidney Foundation	kidney.org	704-393-5780
Cooperative Christian Ministry	cooperativeministry.com	704-786-4709
Charlotte Rescue Mission (will take mattresses)	charlotterescuemission.org	704-334-4635
Room at the Inn (Homeless)	urbanministrycenter.org	704-347-0278

# **FOOD**

Carolina Refugee Resettlement	carolinarefugee.org	704-535-8803	
Matthews Help Center	matthewshelpcenter.org	704-847-8383	
Second Harvest Food Bank	secondharvestmetrolina.org	704-376-1785	

# **CLOTHING**

AMVETS	amvetsnsf.org	704-393-2359
Catholic Social Services	cssnc.org	704-370-3283
Crisis Assistance Ministry	crisisassistance.org	704-371-3000
CVAN (Battered Women)	cvan.org	704.788.1108
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Salvation Army	salvationarmycharlotte.org	800-528-0244
National Kidney Foundation	kidney.org	704-393-5780
Cooperative Christian Ministry	cooperativeministry.com	704-786-4709
Charlotte Rescue Mission	charlotterescuemission.org	704-334-4635
Lydia's Loft	lydiasloft.org/	704-948-7797
The Bin	the-bin.org	704-948-5612

# **CLOTHING - SPECIFIC**

Women's clothing, shoes & accessories	Christian Ministries Give-Back Boutique	givebackboutique.com	704-663-3677
Women's business clothing	Dress for Success	dressforsuccess.org/charlotte	704-525-7706
Men's business clothing	Jacob's Ladder/Opportunity House	jacobsladdercharlotte.org	704-332-5822
Shoes	Soles for Souls	soles4shoes.org	866-521-shoe

# **ELECTRONICS AND ENTERTAINMENT**

Phones, computers, cartridges, reusable batteries	Best Buy	bestbuy.com	888-237-8289
Computers, CD's, Videos, DVD's	Green Disk	greendisc.org	800-305-disk
Phones, computers, cartridges, reusable batteries	Staples	staples.com	800-333-3330
Books, CD's, DVD's	Local Libraries	YellowPages.com	Yellowpages.com
Craft Supplies	Local Senior Centers	YellowPages.com	
Family friendly DVD's	Kid Flicks	kidflicks.org	kidflicks@aol.com
Magazines	Local Hospitals, Senior Centers, Care Communities	Yellowpages.com	Yellowpages.com

# Personal Care/Medical

Medical equipment	PACE (Program for All Inclusive Care for Elderly)	pacesp.com	704-887-3840
Personal care items, OTC meds	Room at the Inn (Homeless)	urbanministrycenter.org	704-347-0278
Prescription medications	Local Police Department	YellowPages.com	704-664-3311
Toiletries	Clean the World	cleantheworld.org	407-574-8353

# **O**DDS AND **E**NDS

New and used stuffed animals	Stuffed Animals for Emergencies	stuffedanimalsforemergencies.org	charlottesafechapter@g mail.com
Tools	Charlotte Community Tool Bank	charlotte.toolbank.org	704-469-5800
Jewish related charities	Friendship Circle	friendshipcirclenc.org	704-366-3984
Local online site – offer anything you'd like to give	FreeCycle.com	freecycle.com	Freecycle- Charlotte@yahoogroups.c om



There are three things I believe we can safely agree on. First, making more money is a good thing. Second, we'd like to a U\_Y more money while working less. Third, we would like to make more money, working less, with happy clients that are easy to deal with.

Sometimes we get lucky and the planets align showering upon us the above trifecta like manna from Heaven. The rest of the time we have to come up with ways to create it for ourselves. To help you on your way, I have two words – Move Manager. Trained and experienced in helping clients with every aspect of a home move or transition, a Move Manager could be your new best friend.

Move Management is a growing field of trained and certified professionals focused on making relocations easier and smoother for clients. With services that range from decluttering and down-sizing, packing, unpacking and complete resettling; they offer a single source of help for clients tackling the massive "To-Do List" moving creates. A Move Manager is on hand to help your client emotionally, physically and logistically throughout the moving process. And the underlying beauty is that their service fees are paid by the client and not out of your commissions.

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YUfb a cfY, k \]Y k cf\_]b[ "Ygg UbX WfYUf]b[ 'U VYffYf'
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## 1) Time is Money

Getting a home ready to put on the market can take clients weeks, even months. Often your clients are busy with their lives and just don't have time. Sometimes the mere thought of tackling the pre-move prep may have them so overwhelmed they become paralyzed. Move Managers know what to do and how to get it done. Focused on getting the house ready to be listed efficiently and quickly, they have proven processes, trained staff, and the resources to get a house decluttered, cleaned up, cleaned out, and staged in days. Faster to market equals faster to sell.

# 2) Move Managers Specialize in "Stuff"

I'm willing to bet your clients have stuff. Lots of stuff. Way more stuff than they need and certainly more stuff than you want in their house when you list it. Seeing as organized homes command higher prices, paring down and straightening up can directly impact the sale price of a home. Move Managers efficiently, yet compassionately, work with clients to cut back on the extras so homes are minimal. They are experienced in gently guiding clients through the process of deciding what to keep, donate, sell, gift and discard. As a bonus they deliver donations, facilitate consignments and will even pre-pack unneeded items in preparation for the move.

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Buyers want plenty of storage space. Cramped closets, creepy basements, junked up garages that don't fit cars, and overflowing attics don't help when you're looking to show off a home's storage capacity. Home and estate clean-outs are part of a Move Manager's wheelhouse so they have no fear when it comes to your client's skeletons in the closet - at least the literal ones! By clearing out and organizing these areas storage spaces show as clean, spacious and plentiful. A beautiful thing for buyers who have a plethora of their own stuff!

## 4) Staging Magic

Research consistently shows that staged homes sell faster. Move Managers know how to create a warm and inviting home that potential buyers can easily envision living in. From depersonalizing and decluttering to furniture and décor placement, they can create miracles.

## 5) One Stop Shopping

Because Move Managers facilitate the entire moving process, in addition to their own expertise, they come with a network of trusted service providers. Their collection of vetted professionals is on hand to help with everything from air conditioning to washing machine stabilization and all the nuts and bolts in between. So when your client realizes that they forgot to make arrangements for Yoshi the dog on moving day, no worries, your Move Manager has a pet sitter on hand.

## 6) They'll Handle Time Consuming Tasks

Organizing, packing, and cleaning-out can be time consuming and for most seller's it's the ugly side of moving. Having professionals on hand to clear the client's plate of these necessary evils frees them up to maintain a certain level of normalcy during the transition. It also allows them to focus on other import important tasks.

## 7) Move Managers Are There to Hold Hands

Move Managers are people that clients lean on. A large portion of their training and time is spent focusing on assisting clients with the emotional aspects of moving. As a steady, encouraging force throughout the move process, you can count on them to help keep your clients focused on the end result, moving forward and headed in the right direction.

So there you have it – seven ways a Move Manager can help you make more money, working less and while creating happier clients by providing an easier and less stressful moving process. It's like manna from Heaven... without worrying about carbs and fat!



When you are ready to get organized a great way to start is by focusing on "types" of items rather than specific "areas". For example, you may work on your collection of socks or coats ("type") rather than a closet or drawer (an "area"). There are several benefits of this method, but clients tell us their favorites are that 1) it is manageable and tends not to be as overwhelming, and 2) by pulling out and looking at all of your socks (we know you have an amazing collection) you can better judge what you really need to keep and what you can safely let go of.

Prior to starting be sure to stock up on trash bags and set up a box for "Donations" and "Items to Gift". Once the boxes are full load them in your car and deliver them to their new home. Replace and repeat!

## Here is a list of 60 things to get you started on your path to becoming "rightsized".

- 1. Mugs
- 2. Pens, Pencils, Markers, Crayons
- 3. Socks, Pantyhose
- 4. Tupperware, Plasticware
- 5. Books
- 6. Magazines
- 7. Recipes
- 8. Catalogs
- 9. Cooking Utensils and Bakeware
- 10. Keys
- 11. Unused/Expired prescriptions
- 12. Unused Kitchen Gadgets and Appliances
- 13. Purses
- 14. Vases, Dried Flowers
- 15. Food/Canned Goods
- 16. Spices
- 17. Mail
- 18. Expired OTC Medicine, Vitamins
- 19. Toys, Games, Puzzles, Cards
- 20. Electronics
- 21. Kids Artwork
- 22. Duplicate Photos
- 23. Linens, Towels, Blankets
- 24. VHS Video Tapes, DVD's, CD's
- 25. Computer Software, Floppy Discs
- 26. Knick-Knacks and Décor You Don't Love
- 27. Dead Plants, Bulbs, Seeds
- 28. Planters, Pots
- 29. Holiday Decor You Don't Love
- 30. Serving/Entertaining Pieces

- 31. Abandoned Craft Projects, Craft Supplies
- 32. Make-Up, Toiletries
- 33. Old Credit Card & Bank Statements
- 34. Lotions, Perfumes
- 35. Travel Samples
- 36. Dead Batteries
- 37. Greeting Cards
- 38. Extra Tools
- 39. Candles
- 40. Pet Paraphernalia
- 41. Costume Jewelry
- 42. Coupons
- 43. Old Receipts
- 44. Hats, Gloves, Scarves
- 45. Paint
- 46. Old Bills, Tax Returns (over 7 years)
- 47. Cleaning supplies
- 48. Coat Hangers
- 49. Newspapers
- 50. Partially Used Notebooks
- 51. Unneeded Business Cards
- 52. Old Take-Out Restaurant Menus
- 53. Eyeglasses
- 54. Separated Socks and Earrings
- 55. Extra Buttons
- 56. Travel Brochures, Maps
- 57. Shoes, Belts
- 58. Old Address Labels
- 59. Past Calendars
- 60. Old Pillows



# CALM YOUR PAPER CHAOS What to save

# what to **shred...**

**Paystubs** Credit Card Stmts **Utility Bills** 

Otly Investment Stmts Medical Receipts (routine health)

Stock Sale Docs Annual Investment Stmts **Bank Stmts** 

YEARS

Medical Receipts (serious condition)

Satisfied Loans Tax Returns & Supporting Docs **/EARS** 

WHILE **ACTIVE** OWNED

Sales Receipts Disputed Bills Warranties Insurance Policies

**Property Tax Records** Auto Records Medical Records (ongoing condition)



# Documents for **safe keeping**

#### **LIFE EVENTS**

Birth Certificates
Death Certificates
Marriage Licenses
Divorce Papers
Adoption Papers
Citizenship Papers
Veterans Documents
Passports

#### **ESTATE PLANNING**

Will
Letter of Instruction
Trust Documents
Burial Plot, Funeral Arrangements
Power of Attorney/Guardianship

#### **BANK ACCOUNTS**

List of Bank and Investment Accts List of Safety Deposit Boxes

#### **PROOF OF OWNERSHIP**

Housing, Land and Cemetery Deeds
Escrow Mortgage Accounts
Proof of Loans, Debts, Mortgages Owed & Paid
Stock Certificates, Bonds, Brokerage Accounts
Partnership & Corporate Operating Agreements
Vehicle Titles

# PASSWORDS

Utilities
Credit Cards
Bank Accounts
Social Media
Electronics
Websites
Medical Providers

### RETIREMENT

Social Security IRA 401(k) Accounts Pension Documents Annuity Contracts

#### **HEALTH CARE**

Personal and Family Medical History
Durable Health-Care Power of Attorney
Authorization to Release Health-Care Info
Records for Major Medical Events
Living Will
Do-Not-Resuscitate Order

This document is intended to assist with the organization of personal paperwork. It is not to be considered legal, tax, or accounting advice. Always consult with your legal, tax, or accounting processional for confirmation of what is best for your personal situation.