



# SENIOR LIVING CASE STUDY

**How Erickson Senior  
Living Gives Residents a  
Head Start on Their  
Second Chapters**

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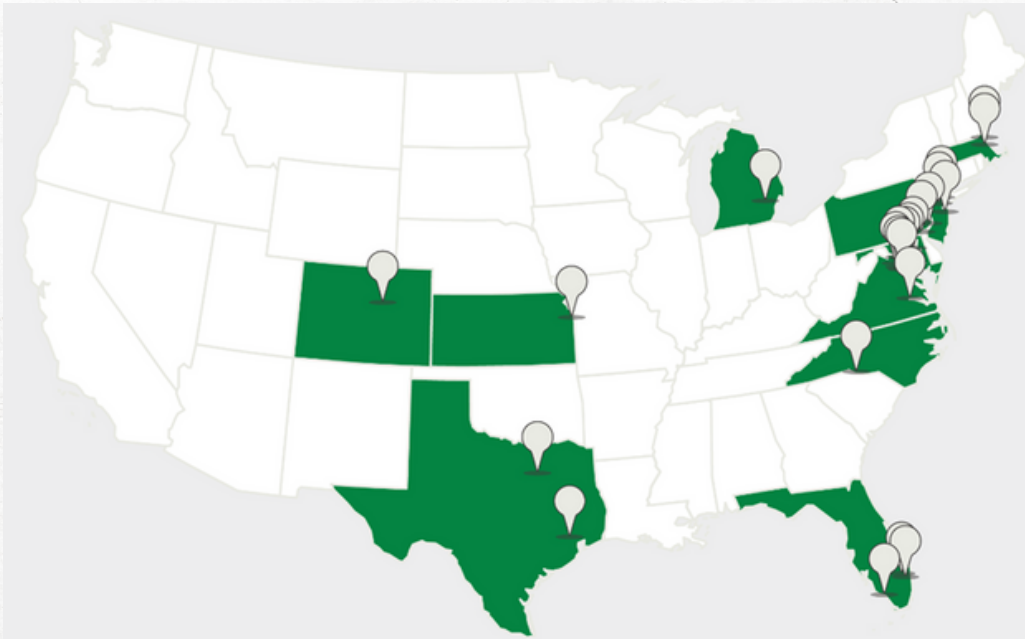
 **Erickson**  
SENIOR LIVING®



## THE CHALLENGE: Allowing for the Smoothest Transition for New Erickson Residents

Erickson Senior Living offers 24 of the top senior living communities in the country. The continuing care retirement communities provide maintenance-free, independent living for seniors and a full continuum of healthcare services, including an on-site medical center.

With a variety of stylish apartment homes to choose from, residents are free to enjoy all the activities, amenities, and services the picturesque communities have to offer as part of an active, engaged retirement lifestyle. Most of the interest in the senior living communities comes from people in their 70s who want to continue pursuing an active, engaged lifestyle.



### Things that set Erickson Senior Living apart from other older adult communities:

- 24 locations in 11 states as of Fall 2023, with a \$4 billion national expansion planned to create 6,300 new apartment homes in Texas, Massachusetts, Illinois, California, New York, Florida, Maryland and Virginia
- A focus on wellness and living your best life – physically, mentally and socially
- Indoor and outdoor social spaces, such as firepits, fitness equipment and pickleball courts
- Tech-based amenities, such as virtual golf, keyless entry systems, and electric vehicle charging stations
- Additional onsite health services available if needed, such as assisted living, memory care, long-term care, and rehabilitation
- Partnership with Wheaton | Bekins to safely move in new residents
- And more!



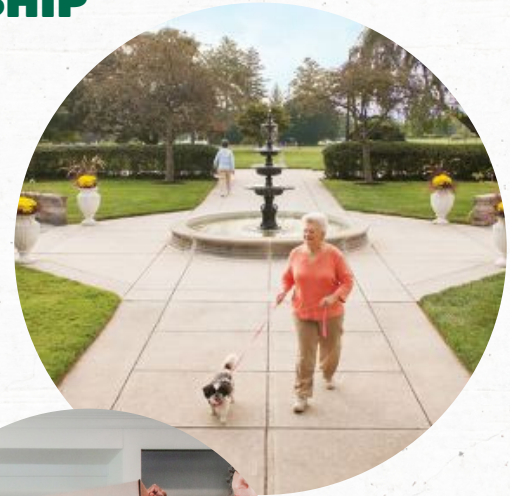
## ERICKSON SENIOR LIVING + WHEATON | BEKINS PARTNERSHIP

Erickson Senior Living further stands out from the crowd because of its partnership with Wheaton | Bekins, a nationwide household goods moving company. Oftentimes, residents move to Erickson locations from out of state, complicating the process of getting settled into the community. Erickson has a standing relationship with Wheaton | Bekins that significantly lightens the load of stress moving can cause new residents.

Wheaton | Bekins is a company that combines two long-standing moving brands. Wheaton World Wide Moving, founded in 1945, was the first van line to qualify for licensure in all 50 states. Its partner company since 2012, Bekins Van Lines began in 1891 and is the longest continually running van line in the country. Together, Wheaton | Bekins is an ESOP company that consistently

earns safety awards through the American Trucking Association and its forerunner, the American Moving & Storage Association.

Over the years, the van line saw the need for more specialized care for older adult customers, so the Wheaton | Bekins training team worked with the National Association of Senior Move Managers (NASMM) to develop Silver Certification, a training program designed to instruct local moving agents on better assisting older adult customers. In the process of certification, each local moving company dedicates five of its employees from every level of the organization to the focused training. Silver Certified agents understand the challenges of moving older adults and are comfortable working with the adult children of residents and being mindful of changing physical and mental needs.





## MOVING AS AN OLDER ADULT

According to data collected by the U.S. Census Bureau from 2015 to 2019 and reported in a [2022 report](#), older adults move less frequently than younger adults, and their moves tend to occur due to unique housing preferences and needs.

More than  
**3 million**

adults aged 65 and over moved in the previous year, representing about 6.2% of the age segment. In the age segment 55 to 64, a slightly higher percentage (7.4%) moved in the previous year.

More than half  
**about 58%**

of moves during the prior year for older adults ended within same county where the moves started.

**The percentage of out-of-state moves was higher for the 65 to 74 age group,**

as more of the newly retired moved to warmer climates or to be closer to family. The South, specifically Florida, gained the most older people through migration during the 5-year survey.

**More than 600,000 of the 65 and over moves were out-of-state from 2015 to 2019.**

A follow-up U.S. Census report showed an increase in out-of-state moves by 2.1% over the whole population from 2019 to 2021, most likely influenced by the COVID-19 pandemic.

Older adults with a disability were more likely to move and made more short-distance moves than those without a disability.

The percentage of short-distance moves increased from the broad 65 and older age group to the more specific 85 and older segment of older adults. **People age 85 and older had the largest percentage of moves within a county (64%) compared to all other age groups** – likely due to health concerns.

# CHALLENGES IN MOVING OLDER ADULTS



Whereas young adults often start fresh, purchasing new items for their first homes, older adults have a lifetime of memories to relocate.



Housing transitions for older adults can often include downsizing, during which items must be delivered to multiple residences, such as the older adult's new home and the homes of multiple adult children.



Physical abilities can limit older adults from many parts of the move, sometimes including the decluttering and packing in addition to the loading and delivery.



In cases where dementia or other maladies affect the homeowner, a surrogate may need to be involved in the move, oftentimes the oldest adult daughter.



After living in a home for decades, sometimes raising their children there, it can be difficult emotionally for an older adult to leave.

Older adults have an increased risk of being taken advantage of by a rogue mover





## INCREASED DANGER OF MOVING FRAUD

About  
**3,000**

**Americans experience moving fraud every year, according to the Federal Motor Carrier Safety Administration (FMCSA).**



That's why ethical moving companies like Wheaton | Bekins and its agents work to educate prospective customers about what to watch out for when choosing a mover. The FMCSA created a helpful brochure called "Your Rights & Responsibilities When You Move" to warn the public about moving fraud.

Unfortunately, there's not much more the government organization can do to crack down on rogue operators; while the FMCSA publishes the complaints alongside the fraudsters' company names on its website, oftentimes the perpetrators simply change their company name and continue their scams.

Older adults are far more likely to be targeted with scams because of greater amassed wealth and the potential for cognitive decline, so choosing a mover after age 50 is an important decision.



# DOS AND DON'TS TO FOLLOW WHEN CHOOSING A MOVING COMPANY

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## Demand an Extensive Evaluation

Ask for an in-person survey of your possessions or an in-home estimate for precise cost evaluation.

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## Review the FMCSA Documents

Read these crucial papers containing essential details about your rights and responsibilities during relocation.

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## Inquire Thoroughly

Query about the company's background, their insurance details, licensing status and their approach to dispute resolution. Knowledge is your best defense.

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## Verify the Company

Check the company's registration on [protectyourmove.gov](http://protectyourmove.gov), an official U.S. government platform promoting consumer safety in the moving sector.

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## Avoid Signing an Incomplete Document

An unfinished document might later include terms you didn't consent to. Insist on signing fully completed paperwork only.

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## Don't Depend on One Estimate

Obtain several estimates from various moving companies to ensure you're not overcharged.

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## Steer Clear of Uninsured Movers

Without insurance, you may be responsible for any damage or loss. Always confirm your mover's insurance status.

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## Refuse to Pay a Huge Initial Deposit

Scammers might vanish with your deposit without providing any services.

***After instituting the relationship between the community and the van line, the entire move-in experience became more streamlined.***

## CREATING SMOOTH MOVES

Previous to the Erickson Senior Living || Wheaton | Bekins relationship, the process for moving in residents was largely ad hoc. New residents were responsible for contacting a moving company, setting up the time for their move-in, and updating the company on the community's move-in policies. It was a lot of work for new residents at a time when they had a lot on their minds, what with leaving their homes and all that was familiar to enter a new community.

The ad hoc situation was stressful for current Erickson community members and staff, as well. With multiple movers from different companies entering the facility – many for the first time – community time repeating policies to each and every mover, explaining the methods for reserving elevator time and minimizing hall blockages, and guarding residents and their property from people they did not know.

Beth Brandenburg from Wind Crest community in Denver shared:

**“I remember one couple who wanted someone from their church in California to move them. It was another big van line. The couple who moved them in were just awful. The residents moving in sat on their sofa and cried. The move didn't finish until after 9:00 at night.”**

- Coordinators at Erickson let new residents know Wheaton | Bekins would be in touch as soon as their unit came available. The built-in communication made for one less thing the older adult needed to worry about. The coordinators, too, were able to move on, knowing the logistics of the new resident's move-in would be taken care of in a timely manner – rather than needing to take the lead on following up with the resident to make sure their item delivery would be taken care of.
- Residents could rest easy in terms of choosing their mover, knowing they would not fall victim to rogue operators, since Wheaton | Bekins had Erickson's seal of approval. Likewise, Erickson coordinators felt a sense of relief in knowing they could trust the movers.
- Strangers in the community were no longer an issue. Wheaton | Bekins reserved its network's best crews for Erickson moves; oftentimes that meant the same individuals serviced each resident's move. Over time, these crews got to know Erickson staff and residents, resulting in high fives, hugs and good banter when the Erickson community members saw people from Wheaton | Bekins they recognized and respected. That same familiarity allowed the Wheaton | Bekins crews to get in and out of the facility in the most efficient manner.
- Erickson staff were able to complete other significant tasks instead of needing to explain move-in policies over and over to multiple movers. They could trust Wheaton | Bekins to know where to park, which elevators to use, etc.
- In a state-to-state move, the dates of pickup and delivery were organized on a spread – meaning the mover gave the customer a range of dates when their items would be picked up and when they would arrive at the destination – rather than a specific date. This practice gave the truck driver leeway for traffic, weather, and other obstacles, which was important, since the average distance for our residents from their out-of-state move to the facility from 2019 to 2023 was more than 1,200 miles. While realistic, the spread practice was difficult for our residents to plan for. Wheaton | Bekins offered Erickson residents Day Certain Delivery, meaning neither the resident nor the facility would have to be flexible when it came to their moving date – a huge relief for the entire Erickson community.





"We can feel confident that the crew understands our expectations and guidelines so we don't have to worry about them parking someplace they shouldn't, propping doors open, blocking hallways, etc. This allows for a move to not be disruptive to current residents."

*- Beth Brandenburg | Wind Crest Planning & Moving Consultant*



"Excellent job. Driver was superb. Would insist on having him for any move...Exact timing of both ends. Efficient. Price was reduced because we got rid of some furniture. Felt the weight was honest."

*- Wes & Jackie L. | Wind Crest residents*



"Wind Crest explained that Bekins understood and complied with Wind Crest's requirements to move residents in. I spent 30 years in the Navy and had a lot of interstate moves. This was the best that I had experienced. I wish to commend the Customer Service representative with whom we worked: Salina Furtrelle and the driver, Adrian Houle. Both were very professional, responsive to our requests and made the move experience a positive one. We particularly appreciated that we had a door-to-door move: the truck came down from Denver, packed and loaded our possessions (with another rental truck obtained in Albuquerque) and drove them back to Denver for delivery 2 days later."

*- Ray W. | Wind Crest resident*



# CONTACT INFO

Get a free, no obligation estimate from your local Wheaton | Bekins agent.

## BEKINS VAN LINES

Bekins.com

U.S. DOT No. 2256609 | MC 770031

## TODD EMRICK

Older Adult Ambassador

317-558-0213

## WHEATON WORLD WIDE MOVING

WheatonWorldWide.com

U.S. DOT No. 70719 | MC 87113

