

Relocation Checklist - International



Moving abroad is an exciting adventure, but it requires careful planning and preparation.

That's why we've collected everything you'll need to do in the months leading up to your big move in one simple moving checklist!

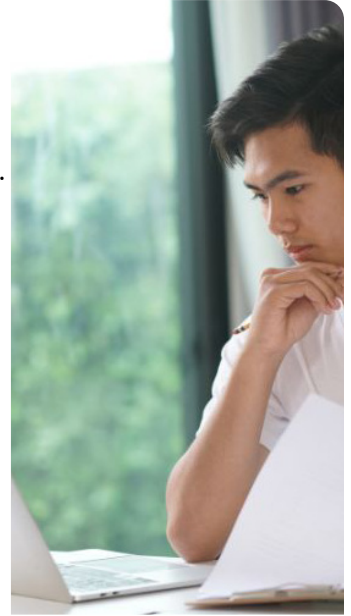
It's easy to use and covers many tasks millions of other transferees have completed.

By starting early and being organized, the stress of a global move can be minimized.



6-9 Months Before Your Relocation

- Start early and contact your employer to get info on your relocation benefits**
- Create either an electronic or hard copy “move” binder**
 - Track all important move-related paperwork checklists, contracts, receipts, appointments and deadlines.
- Apply for Visas or Permits**
 - Discuss your visa and/or permit requirements with WHR and your designated immigration consultant.
 - Confirm the type of visa you need and any associated documents (originals, signed copies, apostille).
- Prepare your family and your pets**
 - If you have young children, it’s a good idea to start prepping them mentally for the change.
 - Moving to a new place can be hard; Start getting them excited about the move now so they have as much time to process.
 - Notify school(s) of your move.
 - Plan final events and activities for them to create memories with friends.
 - If you have pets, investigate the process for bringing them into your new country.
 - Check quarantine requirements, vaccinations, restricted breeds, and necessary paperwork.
- Evaluate current residence**
 - Decide what to do with your current home: rent it or sell it.
 - Selling your home? Speak with your WHR Relocation Counselor to obtain a qualified real estate agent.
 - If renting, notify your landlord in a timely manner.
 - Confirm and review rental agreement and begin planning your lease termination.



- Plan ahead for the housing in the new location**
 - Research housing options in your destination city.
 - Connect with your WHR Relocation Counselor to see if you’re eligible for assistance in the destination from local agents or destination services providers.
 - Decide whether you’ll rent or purchase, and carefully review all implications.
 - Arrange for pre-assignment services such as home finding, school search and orientation tours, if eligible.
 - Evaluate the local area:
 - Cars, walking or public transportation available.
 - Consider the neighborhood and location.
 - Local entertainment.
 - Does the community have shared language and culture?



- Culture and language training, customs and laws**
 - Language skills: if your destination country has a different language, consider learning the native language or some basic phrases. It will help you navigate daily life more easily.
 - Understand etiquette, culture and the laws.
 - Research expat groups or interest meetups.
- Healthcare and medical needs**
 - Visit your doctor to ensure you’re in good health for the move.
 - Obtain any necessary vaccinations, boosters, prescriptions or medications.
 - Ask medical providers for potential recommendations in the new location, or consult with an international health advisory professional and determine healthcare options in your new country.
- Financial preparation**
 - Set up a budget that accounts for the cost of living in your new country.
 - Consider currency exchange rates, banking options and international money transfers.
 - Emergency fund: build up an emergency fund to cover unexpected expenses during your transition.
 - Research tax laws and meet with an accountant in your destination country, if not already covered by your employer. You may be liable for taxes in your host country and your country of citizenship. Find out what your tax status will be when you are living abroad.

3 Months Before Your Relocation

Prepare to speak with the moving company

- If your employer authorized a household goods shipment with a moving company, WHR will coordinate these services for you. However, it's important that you've mentally decided which items will be shipped, sold, discarded, and donated to maximize efficiency on moving day.
- Moving companies are typically busiest during the summer months (i.e., peak season). Make sure you request your preferred pack & load dates **6-8 weeks in advance**.
- Speak with your significant other and children (if applicable) to decide which items will be shipped.
- If you have items in storage at a second location, notify the moving company as soon as possible.

Pack vital documents and valuables (keep separate and secure)

- Compile all medical/dental records, prescriptions, inoculations, visas, permits, passports, and ID cards.
- Prepare a list of valuables and plan on keeping them with you personally.

Review/update change of address checklist (on the next page)

- Begin to complete all account transfers, cancellation of services or closing of accounts.

Continue coordinating with your designated moving company

- Confirm which items will fit in your shipment(s), and the estimated transit times.
- Complete all insurance documentation as soon as possible.
- For delicate and/or high value items, take several pictures to document its condition pre-move.
- Collect receipts and/or obtain appraisals for other high value items.
- Speak with the moving company to confirm what documents are required for customs import/export.
- Confirm with the moving company which items aren't allowed in your shipment.

Determine the actual move date

- Keep track of any related travel documentation.
- Coordinate with your employer and request any required time off for preparation or actual move-out/move-in dates.
- Will items be immediately delivered or will you require storage in the new location? Investigate and secure storage if needed.

Complete any travel arrangements

- Search airfares to determine the amount of luggage you will have as checked baggage and carry ons.
- Book flights and hotels.
- Arrange short-term accommodations if you haven't found a home yet.

Coordinate closely with your moving company to export/import goods (firearms, alcohol, and more).

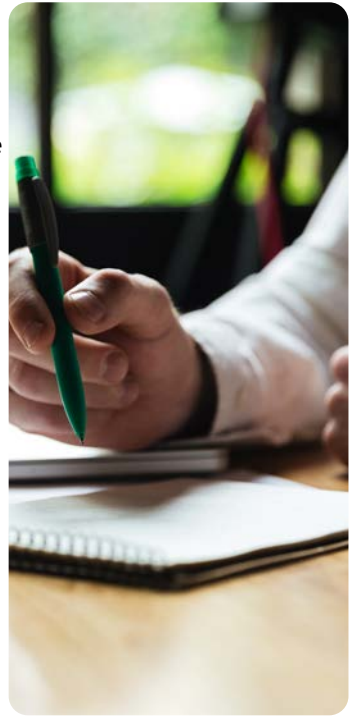
Delays or denials in custom clearance can significantly impact the timing and cost of your relocation, including taxes, duties, tariffs, and temporary housing extensions.

Complete any required home improvements

- If you're renting, complete so your security deposit is returned in full.

Conduct a room-by-room survey

- Slim down your belongings and sort items to keep, donate/sell, recycle and discard.
- Coordinate garage sale and charity donations.
- Obtain receipts for all items given to charities.
- Measure furniture for placement at new home.
- Have valuable items appraised. Photograph/videotape.
- Consider storing some of your belongings rather than shipping everything to your host country.
- Check whether or not appliances will work in the new country, if not donate.



Change of Address Checklist



To make sure your transition is smooth, notify the following of your move/change of address
Complete all account transfers, cancellation of services or close the accounts

Utility & Home Services

- Gas
- Electric
- Water
- Internet, Cable & Satellite
- HOA
- Cell Phone Provider
- Garbage Removal
- Landscape/Lawn or Snow Removal Service
- Home Security
- Other Home Delivery Services
- _____

Government Agencies

- U.S. Postal Service (usps.com)
- Internal Revenue Services
- Voter Registration
- Social Security Administration
- Department/Registry of Motor Vehicles
- Department of Veteran Affairs
- Citizen & Immigration Services (non-citizens)
- Local Tax Agency
- Other
- _____
- _____

Financial

- Your Employer
- Banks & Credit Unions
- Finance/Loan Companies
- Credit Card Companies
- Financial Aid Office

Insurance

- Homeowner/Renters
- Health
- HSA
- Dental
- Vision
- Life
- Car

Service Providers

- Doctors
- Dentists
- Pharmacy
- Veterinarians
- Attorneys
- Accountants
- Airline Frequent Flyer
- Roadside Assistance
- Subscriptions
- Memberships
- _____
- _____
- _____

Community

- Friends & Family
- Schools
- Alumni Associations
- Charity/Nonprofit
- Religious Organizations
- Clubs & Organizations
- _____

Other

- _____
- _____
- _____
- _____

1 Month Before Your Relocation



- Continue reviewing/updating change of address checklist**
- Make time for loved ones**
 - Now is the time to start planning goodbyes and gatherings.
- Arrange any final visits with doctors, dentist or hairdresser**
- Schedule final pet(s) immunizations, grooming and gather travel documents**
- Confirm plans with movers, friends/family**
 - Contact moving company to confirm dates of load, pickup and delivery.
 - Do not shut off utilities too soon, in case your moving date changes.
 - Arrange for someone to look after children and pets while the movers are packing.
- Ask about moving in/out or special requirements**
 - Measure your doorways, hallways elevators and stairs – it's important to know all of your furniture will fit and whether it needs to be disassembled.
 - Do you need to reserve an elevator or are there any association restrictions on the move dates?
 - Will your building or street be available or have any restrictions on the day of the move?
- Buy products that will not be available in your new country**
- Order and assess the correct outlet plugs for your appliances and tools**
- Confirm you received all required permits for exporting and importing goods**
- Plan ahead for the new location**
 - Will you need improvements at the new location?
 - Plan and order decor for your new home.

1-2 Weeks Before Your Relocation

- Obtain some host country currency before your arrival**
- Do a deep clean**
 - Dispose of all flammable, corrosives, poisons, paint and items you can't move like detergents, gas, and cleaning supplies.
 - Defrost freezer, clean refrigerator & oven.
 - Plan meals to use up items your packaged and frozen foods. Donate anything still left.
 - Clean your home:
 - Many people use move-out cleaning services.
 - If you clean yourself, make sure to mop, dust and wipe down surfaces, blinds and baseboards.
 - Be mindful of which areas you clean, such as the floors, as they may need another cleaning after the moving company completes their services.
 - Remove nails and screws from walls and fill in holes with spackle.
- Take Care of Housekeeping Items**
 - Return any borrowed items to friends, neighbors, co-workers, family, & library books.
 - Make sure to pay any fees or penalties, like unpaid parking tickets, legal fees and local or state tax payments.
 - Take any items that need to be returned to local stores.
 - Pick up any remaining clothing items from the dry cleaner.
 - Refill prescriptions, get supplies and generic names of all necessary medications, contact lens/glasses.
- Schedule final walk-through and assemble a folder of important information for the new owner(s)**
- Make a list of contact names and numbers**
 - Keep handy this list of people/provisions you might require in your first few days after the move.
- Alert your realtor or neighbors that the home will be vacant**

Move-Out Day

- Keep valuables/heirlooms or difficult items to replace with you**
- Plan to be at the home the entire day to supervise movers**
 - Caution movers on fragile and precious items.
 - Oversee the inventory as it is loaded.
 - Read paperwork carefully before signing.
 - Print an info sheet to include the old/new addresses and your cell number.
- Take photos of:**
 - Empty rooms and fitted things as proof of the conditions of the property at move out.
 - Record of all meter readings.
- Do any last minute cleaning before handing it to the new owners**
- Once moving van is fully packed, double-check before leaving**
- Once the transfer is complete return your old property's keys**
- Payment**
 - While payment will likely be direct billed through WHR, consider tipping the crew.
 - Tipping: as with many service industries in the U.S., we recommend tipping the crew lead/driver who will then split it amongst their workers.
 - Please note that tipping is usually not covered by your employer, so please double check your relocation policy (if applicable).
- Ensure all windows and doors are locked**
- Turn off lights and water main valve**



Move-In Day

- Conduct final walk-through**
- Be present when your shipment arrives to coordinate**
- Have a floor plan for placing your furniture**
- Check items off the inventory list as they are unloaded**
- Inspect for damages**
 - Photograph relevant items before signing the release of the Bill of Lading.
- Sign movers' inventory list**
- Double-check nothing has been left in the moving container**
- Confirm payment**
- Ensure working order of items in the new home**
 - Confirm all utilities.
 - Test faucets, toilets, utilities, phones, smoke detectors, and security systems.
 - Turn on water heater if necessary.

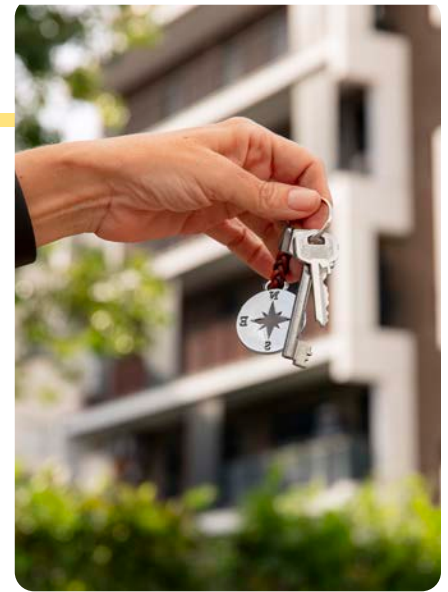
Moving Essentials (Keep Separate/Easy Access)

- Mobile phones and chargers
- Laptops, tablets, and chargers
- Electric Adapters
- Medication
- First aid kit
- Camera
- Clothing and jewelry
- Childrens' comfort toys
- Infant needs
(diapers, food, formula)
- Passports
- Travel documents
- Driver Licenses
- Birth certificates
- Marriage certificate
- Divorce Papers
- Child Custody agreement
- Adoption papers
- Record of Vehicle
"No-Claims Bonus"
- Medical/Dental Records
- Insurance Cards
- Social Security cards
- School Records
- Legal documents like Wills,
Power of Attorney, bank
statements and income tax records

Welcome Home - Getting Settled

Taking a few steps now can help you get settled a little more quickly and be ready to make the most of your new home!

- Celebrate! You've completed your move!**
- Make sure your address is updated (see Checklist)**
- Finish unpacking, flatten/recycle boxes**
- Leave reviews for moving company**
- Obtain new driver's license, rent/purchase vehicles or determine public transportation**
- Find local services for your home/family – including your pets!**
 - Connect with people in your neighborhood and get recommendations and advice on doctors, locations, & other services.
 - Join clubs, religious organizations & local sport's teams.
 - Ask realtor for recommended vendors (plumbers, HVAC, painters, roofers, remodelers, electricians, & landscapers).
- Host a housewarming party**
- Save your moving binder**
- Update your budget**
 - Review, assess and create a new budget.
 - Are there new expenses at your new home that you need to account for? Depending on where you're moving from and moving to, you may have new monthly expenses like lawn care or snow removal service, or you may need to purchase some additional tools or equipment to maintain your home. Will commuting and entertainment costs go up or down if your proximity to work or social activities has changed?
- Reassess your financial goals**
 - A new home can come along with big changes in lifestyle and priorities, take time to review long term goals.



Acclimate and enjoy your new home, country, community and job

Global Mobility Glossary

Air Shipment (Air Freight): An air shipment (air freight) is the transportation of a household goods shipment by aircraft. Depending on the relocation package, assignees are most often eligible for a single "D" container (typically family size 1-2), a single "LDN" container (typically family size 3-4), or two "D" containers (family size 4+).

Air Waybill (AWB): An air waybill (AWB) is a contract between the shipper and air carrier, containing the shipping terms and conditions. It is issued in non-negotiable form and serves as a receipt for the shipper.

Bike Carton: A bike carton is a shipping container specially designed for bikes. Bike cartons usually have dimensions around 54" x 8" x 28", and once the front wheel, pedals, and handlebars are removed, it is reasonably well protected for transit.

COD: Cash on Delivery is a household goods shipment where payment is made at the time of delivery. Even if your employer pays for a household goods shipment, there may be unusual items which are not covered by your relocation policy. If you still decide to move these items, the moving company may charge you COD instead of your employer.

Crating: During the household goods shipment process, crating is when the moving crew packs goods into a wooden container for shipment, or a purpose-built box for crating, such as a TV crate. This may be done by a third-party specialist (i.e., third party services) instead of the moving crew.

Customs: During the household goods shipment process, customs is the official department that administers and enforces a government's rules protecting a country's import and export revenues.

Customs Clearance: Customs clearance is the documented permission required by a country's customs department which allows imported goods to enter a country or for exported goods to leave the country. Customs clearance is given to a shipping agent to confirm that all duties have been paid and entry/exit permission granted.

Discard & Donate: Discard & Donate refers to a moving program in which professionals help sort, organize, and remove items prior to a move. Taking this time upfront enhances the marketability of a home during showings, reduces the overall cost of a move, and helps homeowners settle into their new homes more quickly.

Freight Forwarder: A freight forwarder is an independent company that handles export shipments on behalf of the shipper. Their role is to make the arrangements and take care of necessary documentation.

Household Goods (HHG): Household goods (HHG) are private belongings that are typically the goods transported in a domestic move (a.k.a. a household goods shipment, or HHG shipment).

Long Carry: For household goods shipments, a long carry is a lengthy distance between the entrance of the origin or destination residency and the removals vehicle. This makes it more difficult for the removals team to load and unload goods due to poor property access and may result in additional charges. Long carry may also refer to have to move goods above the first floor without an elevator/ lift (i.e., stair carry), which can also result in additional charges.

Packed by Owner (PBO): most often refers to a box, several boxes, or an entire shipment which was packed by the items' owner/ shipper. Employees and corporations should exercise caution as boxes which are PBO may not be covered under the shipment's insurance policy, since the moving crew did not pack the goods using best practices to minimize damage during transit, and since the moving crew could not document each item's existence and condition before it was PBO.

Shuttle: During the household goods shipment process, a shuttle may be required, which is a smaller vehicle used for loading a shipping container or removal vehicle when access to the property is difficult.

Storage-in-Transit (SIT): Temporary storage authorized in connection with a shipment of household goods.

Total Loss Insurance: For the employee's household goods shipment, they may receive total loss insurance which is insurance protection for when the goods can't be repaired or the repair costs for the damaged goods exceeds its value.

Unpacking: Within the context of household goods shipments, unpacking is the removal of goods from its packaging and wrapping and usually placed onto a flat surface. It is important for relocating employees to understand their responsibilities during the delivery and unpacking process as the delivery crew will not hang clothes in closets, or place items into drawers and cabinets.

Valued Inventory: For household goods shipments, valued inventory is an inventory of the items and their value contained in the shipment, usually required for customs purposes or insurance.

Warehouse handling (WHH): WHH charges are usually levied for moving items in and out of storage and storage in transit (SIT). When a shipment goes into SIT, there is usually a one-time WHH charge, plus the monthly SIT charge.



Established in 1994, WHR Global (WHR) is a private, family owned, full-service international relocation management company.

We partner with human resources, travel divisions, and global mobility departments at a wide variety of organizations from Fortune 100 corporations to the US Government.

We are dedicated to Advancing Lives Forward® by providing white-glove service for employers and their global workforces. With a proprietary technology suite, WHR strives to offer cost-effective relocation benefits without compromising empathy, ethics, or service.



Wisconsin, USA

**Global Headquarters
Coordinates all relocations
into the Americas**

Basel, Switzerland

**EMEA Office
Coordinates all relocations
into Europe, the Middle East,
& Africa**

Singapore

**APAC Office
Coordinates all relocations
into Asia Pacific**