



Global HR & Relocation Solutions

Going on

Relocation

Check List

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Going on Relocation Check List

Relocation may be a wonderful experience...

When starting to plan your move it often seems that there is no end for the things you should consider. Our relocation checklist makes it easier for you to review your tasks step by step. The checklist is designed for Israeli Expats and their family leaving Israel for a mission abroad.

This report does not refer to inner company's relocation policy and procedures.

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Three Months before Moving

Plan your Relocation Time Line

- Visa Application
- Pre-view trip dates
- Searching for a home and securing it.
- Packaging and shipping your personal belongings
- Evacuating your current accommodation
- End of your employment with the Home Company
- Departing from the Home-Country
- Arriving to the new destination
- Entering into your new home
- Beginning of your employment with the Host Company

Visa

- Make sure your Visa application is in process. It may take few weeks up to several months to issue a Visa according to the location.
- Make sure your Passport expiration date meets with destination immigration regulations (Usually, the passport needs to be valid for more then a year after the end of the assignment)
- Make sure all your family members have a valid passport according to the same conditions
- To renew passport during the assignment you will need to go the Israeli Consulate in the host country.

Income Tax

- Every relocation assignment has many implications on your income tax payments both in Israel and in the destination country. An effective tax-planning program can save you a considerable amount of taxes (and vice versa...). Make sure that you will receive a professional tax



consulting in both countries ahead of time in order to allow you and your company to take the appropriate steps to ensure optimal tax planning.

Health Insurance

- Find out what is the health insurance program that will cover you and your family at the destination place. Some programs do not cover (or cover partially) certain treatments and prescriptions. You need to be aware of any limitation that might constitute a problem to you and to your family in order to consider the implications ahead of time.
- In some countries you will need to get immunizations. Call the health office to get more details. Do not forget vaccination requirements for travelers of all ages. Some vaccines must be given several weeks before leaving.
- Review your current supplementary health insurance (Bituch Mashlim, private Health Insurance) and determine if you are going to keep them during the relocation period.
- Ask your, dentist, ophthalmologist and any other specialists to renew all your prescriptions so that you can continue your treatment abroad. Do not forget to ask for your medical files.
- In case you need any major medical treatment it is recommended you complete the treatment before relocating.

Destination Services at the new location: Home Finding, Area Orientation

- Discuss your home finding trip with your HR department.
- Consider identifying a relocation company to assist you with your Area Orientation, HomeFinding and Settling-in needs.
- Obtain information about your destination area.
- Find out about residential options and living conditions.
- Find out about schools and childcare facilities in your destination area



- Find out what are the new school requirements are? (Report cards, grades, list of textbooks etc.)

Pre-Destination Trip

- Discuss your pre-destination trip with your HR department.
- Plan the agenda of your pre-destination trip.
- Identify resources (colleagues/HR Manager at the destination area, real-estate agents, relocation company, etc.) you can consult for your pre-destination trip.
- Obtain information about your destination area.

Home Search

- Find out about residential options and living conditions.
- Learn the real estate terminology and terms in your destination area.
- Define the specifications of the accommodation you are looking to rent/buy (location, budget, type, number of rooms, etc.).
- Be prepared to invest a significant amount of time and energy in the home search process. In some destination areas there is a low availability of qualified accommodation options. In other areas the lease contract process involves intense negotiations and can take several weeks. In most destination areas landlords are not available on weekends and all meetings need to take place during regular weekdays.

Education/Schools

- Find out about schools and childcare facilities in your destination area.
- Find out what the new school requirements are (report cards, grades, list of textbooks etc.).
- Note that international schools and high-level public schools are often full and have no vacancies. Secure your child place as early as possible.



Spouse Activity

- It is important to start planning for your spouse's activity (employment, education, volunteer activity, etc.) as soon as possible.
- In some countries it is possible to receive a work permit for your spouse. Some companies will apply for a work permit for your spouse. However, it is up to you and your spouse to do the job search in those countries. Take into consideration the applicable professional requirements. Receiving a certification for certain professions (like medical professions) can take a long time and require a great deal of preparation.
- In many cases, the relocation period is an excellent opportunity for your spouse to fulfill long-standing career aspirations. We know of a teacher who took a sculpture training and became a sculpture; of a police officer that went to a chef's school and became a chef; a social worker who finally completed her MA and training and became a psychologist. The sky's the limit – and this can really be the right opportunity.

Providers' Letters

- Letters from providers might be required when opening a bank account, establishing a credit history (in the U.S.), leasing an accommodation, buying a cellular phone and buying insurance. It is recommended to ask for letters from the following service providers:
 - Bank (reliable customers, high standard of payment)
 - Credit card (reliable customers, high standard of payment)
 - Utilities providers: electricity, phone, cellular phone (reliable customers, high standard of payment)
 - Landlord (in case you are currently leasing an accommodation)
 - Car Insurance agent (lack of claims for the last 3 years)



Is there a need for temporary housing in the new location?

- In case you would need a temporary housing solution (either in your country of origin or in your destination area) for a period of more than a few days it is advisable to start looking for such a solution at this stage. Suitable temporary housing solutions for a period of several weeks (especially for families with children) are usually scarce (especially in high-seasons).

Start the process for your current apartment rent

- Should you plan to rent your apartment for the assignment duration you would need to take it to the market through your own contacts, relevant websites, real-estate agents or property management companies.
- It is recommended to consider adding a diplomatic clause to the lease contract. You may use this as a template “The Land Lord is entitled to announce the termination of the contract and its annulment at any time and for any reason by providing the tenant with a minimum of two months notice. The termination and annulment of the contract in this manner does not entitle the Tenant to any compensation, except for rental of one months rent”. However, such wording might have an impact on your residency in Israel for tax purposes. It is recommended that you consult a tax advisor in this matter.

Plan your Household Goods Move

- Following is the process for moving your Household Goods:
 - A professional mover will send you an estimator to visit your home in order to determine the size of your shipment, including your packing requirements. He/she will then be able to tell you the cost of the shipment.
 - You need to coordinate with the moving company in order to receive boxes for packing your goods.



- ❑ Plan and schedule the packing date according to the time it will take the goods to get to your new home. The period of time for door-to-door international sea cargo ranges from 4 to 10 weeks.
 - Discuss Household Goods move with your HR department
 - Are you going to ship the goods with you (furniture, appliances)? – Find out if you will be able to use your appliances in the host country or if it is customary to have them already installed in rented properties.
 - Make a list of the goods you are going to ship and measure furniture
 - Check with your shipping company that your belongings are insured and covered for transportation
 - Make a list of goods you are going to leave behind – are you leaving it in your apartment? Selling it? Donating it or putting it in storage while you are away?
 - Make a list of goods you are going to take with you on the plan (jewelry, camera, items with sentimental value, etc.).
 - Prepare a copy of your passport (each and every page) to provide the movers.
 - Clearly mark and set aside items you do not want to ship.
 - Schedule the packing day
- ☑ **Car Arrangements**
- Selling your car – keep in mind that selling a car may take longer than expected. DO NOT FORGET to change the ownership of the car to the new owner (It will avoid you getting un-necessary tickets...).
 - Storing the car – Have your car tuned up and prepared for the long storage
- ☑ **Pets**
- When moving overseas with pets have to consult with your destination provider for quarantine rules and medical restrictions of your Host-



Company and with your shipment company on the travel arrangements. To travel by air your pet will need to be in good health and be up-to-date with all of its shots and vaccinations. Your pet will need to have a rabies shot prior to traveling. If you are considering tranquilizers for your pet you may want to request some expert medical advice on the risks to your pet.

- Find out what are the destination regulations for bringing a pet into the country: health certificates, identification tag, license, vaccinations and quarantine time if needed.
- Make an appointment for your pet to be examined by your veterinarian. Vaccinations should be up-to-date (especially rabies).
- Remember, a “relocating pet” will be confused, frightened or even become sick. If the pet has a bed used regularly at your old home take it with you so your pet will be more comfortable.

Last Will and Testament

- It is recommended to write a will and to leave a copy in the Home-Country. In the will you would need to appoint someone as a legal guardian for your children in case something happens to you and to your spouse during your assignment (some countries appoint the local authorities as the temporary guardian for orphans in case there is no will specifying the guardian).



One Month before Moving

Secure your New Home

- If you are planning on renting, sign an agreement with new landlord and obtain a post office box or full address for future mail. It is recommended to add a diplomatic clause to the contract. You may use this as a template “The Tenant is entitled to announce the termination of the contract and its annulment at any time and for any reason by providing two months notice. The termination and annulment of the contract in this manner does not entitle the Land Lord to any compensation, except reimbursement for one months rent”
- Arrange for utilities connection.
- Arrange for any repairs in your new house.

Education/Schools

- Register and secure a place for your child at the new school or childcare facility.
- Complete translating school records.

Flight Reservations

- Order your flight tickets and make reservations.

Temporary Housing

- Where will you stay at your new destination until your house is ready with your belongings?
- Make reservations for temporary housing
- Are you going to use your Israeli appliances? Will you rent appliances or purchase them locally?
- Where are you going to stay in Israel until your flight and after your belongings are packed and shipped?



Bank, Money and Credit Card

- Notify your bank and take care of your accounts:
 - ✓ Cash Account
 - ✓ Savings
 - ✓ Stocks
- Arrange and prepare for transferring your accounts to the new destination.
- Arrange for an International credit card. Without credit card in many countries you are a “nobody”.
- Make sure you have enough cash for expenses: rent, insurance, rental car, deposits etc.

Insurance and Pension Issues

- Bituch Menahalim/Pension Fund – find out your company policy. If your company will stop contributing its share, it is recommended to continue the contribution of the appropriate amount for continuation of the “risk” components (life insurance and long term disability insurance) of the managerial insurance/pension fund. In most cases it is possible to keep the RISK components of your managerial insurance/pension fund for a period of 2 to 4 years.
- Health Insurance – make sure you and your family are covered and insured for the trip to your destination and for the first period of your stay until your new health insurance will be in place.
- Luggage Insurance – make sure you and your effects are covered and insured for the trip to your destination.
- House and Belongings Insurance – Find out about the insurance options for your new house and the content of the house (your belongings).
- Car Insurance in the host country – in some countries your driving history and experience will not be considered and you will be treated as a new driver. In some countries this insurance would be 3-4 times more expensive than the regular insurance in case you will choose to use an



international drivers license instead of a local one. Please consult with the locals at your office to find a good insurance agent and rates. In some cases it would be recommended to replace the insurance company after 6 months when you will have an established history. At this point you can receive the regular fees. Ask your Israeli insurance company to provide you with a formal letter (in English) proving your insurance history. It may help you in the host location.

Change-of-Address Update:

- Interior Office
- Friends and family
- Banks
- Insurance companies.
- Credit card companies
- Magazines and newspapers - cancel local newspaper delivery.
- Doctors, dentists and other providers - transfer drug prescriptions
- Post office Follow Me services is limited for other Israelis addresses only – Fill out a post office Follow Me form if needed.

Start packing boxes

- Mark boxes clearly as to contents and room to be placed in. Mark "Open First" clearly on boxes containing important items to be unpacked first:
 - Dishes
 - Pots and pans
 - Alarm clock
 - Bedding
 - Special toys
 - Towels
 - Plates
 - Tools - hammer, pliers, screwdriver



Disconnecting of Utilities and Memberships

- Phone Line – inform your phone provider and ask them to disconnect your phone line or freeze it (this is valid for two years). Make sure the last bill is sent to a familiar contact in Israel.
- Long Distance Calls Company – inform the long distance call company of your move and close your account.
- Electricity – inform the electricity company and ask them to disconnect your apartment/house. In case new tenants take over your apartment/house make sure that meters are read and bills paid accordingly.
- Water – inform the water company/municipality and ask them to disconnect your apartment/house. In case new tenants take over your apartment/house make sure that meters are read and bills paid accordingly.
- Cables/Satellite – inform the cables/satellite supplier and ask them to disconnect the apartment/house. Return the cables/satellite box and request refund.
- Municipality fees – inform the municipality and close your account.
- Gas – inform the gas company and close your account. Shut down the main switch.
- Internet provider – inform the Internet provider and ask to disconnect the services.
- Other – clubs, gym, mineral water, Newspapers and Magazines etc.

National Insurance/Social Security

- National Insurance (Bituch Leumi) – Determine your preferred status while on assignment (temporary assignment or immigration). Inform the office close to your home about your status. In case of a temporary assignment you would need to pay the minimum rate (an unemployment rate) of the National Insurance (160 Nis per month).



- In case the destination country has a Totalization Agreement (Double Social Security treaty) with Israel (Austria, Belgium, Great Britain, Bulgaria, Canada, Czech Republic, Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Poland, Sweden, Switzerland and Uruguay) ask your company about the relevant policy. In addition, you will need to pay Israeli National Insurance minimum rate (100 Nis per month in case of a Totalization Agreement).
- In case you will stay on an Israeli payroll during your assignment, and the assignment period is less than 5 years, you and your company will need to continue the regular contributions to National Insurance and Health Tax:
- In case you are being employed abroad, and you are being defined as an Israeli resident during that period, you will need to make National Insurance contributions according a passive income rate (over 12% up to the National Security and National Health contribution ceiling).

Inform Israeli Authorities

- Bituch Leumi (see previous paragraph “National Insurance/Social Security”).
- Army Unit – in case you are still on reserve duty or in case one of your children is close to the age of first draft notice you should make the required arrangements with the relevant reserve liaison officer (in case of reserve duty) or army enlisting office (in case of a child close the age of first draft notice).
- Broadcast Authority
- In case you are holding a weapon – deposit it (weapon store or shooting place).



Inform Host Country Authorities

- Make sure you have all of the relevant information about the Host Country's registration requirements (social security registration, municipal registration, police registration, etc.).
- Make sure you take all of the required steps in order to apply to the Host Country's registration requirements. In some cases, missing the registration due date may cause severe legal actions up to immediate deportation from the Host Country.

Issue an International Driving License

- Find out what are the driving licensing procedures and rules in your destination and make sure you have all the documents needed to issue a local driving license. To issue an international driving license you need to go to MMSI. Please take with you Israeli driving license.
- **Remember** to find out for how long can you use the International Driving License in the host location before it will expire.
- In the US your driving license is your ID card. Have one with you at all times.



Two Weeks before Moving

- Make arrangements to pick up a rental car**

- Pack your vital documents in one place and keep a copy in a safe place:**
 - Passports
 - Military records
 - Mortgage records
 - Marriage license
 - Birth certificates
 - Vehicle license
 - Stock certificates
 - Insurance and Bank records
 - School records
 - Medical records

- Make arrangements for cleaning your new home.**

One Week before Moving

Until you and your family arrive at your apartment, you will be living in temporary housing and dependent on what you brought in your suitcases. It is recommended to use light but strong suitcases with locks. To avoid loss or delays try not to send the suitcases to the final destination but take them with you even when you have long flights with transits.

- Plan what goes in the plane with you:**
 - Toys and games for kids
 - Passports, important documents and records
 - Change of clothes and toiletries for your first day
 - Clothes for the first weeks that will fit the climate at the destination
 - Bathroom kit – tooth brushes, tooth paste, soap
 - Toilet paper / tissue
 - First aid kit / medications
 - Food kit with bottled water

- Make travel arrangements for your pets** (in case they will relocate as well).