

# RELOCATION ASSISTANCE NEEDS ASSESSMENT

For the \_\_\_\_\_ family

On Approximately \_\_\_\_\_ date to \_\_\_\_\_

## Welcome to paradise!

Moving to a new country, often sight unseen, can be a scary, even terrifying experience. As humans, we are fearful of the unknown, and rightly so. But we have a team of people, American, Canadian, and Mexican, who will help you every step of the way through the often-confusing process. Our goal is to give you peace of mind throughout your move, answer your questions along the way, provide you with the right resources, and give you a soft landing when you arrive. That means a reliable luxury shuttle to transfer you from the Cancun airport to the Puerto Juarez Ferry Terminal, a friendly face when you get off the ferry, a ride to your lodging, safe, affordable housing, short term transportation, and a support network to help you get settled into your new home.

My name is Diane Huth, and I am known as The Runaway Sherpa. I help people just like you run away from a less-than-desirable situation, and run TO a new home filled with joy, freedom, and adventure. I moved to the white sandy beach island of Isla Mujeres, off the coast of Cancun, 2 ½ years ago, and I never looked back. And I can help you do the same thing. You can learn more about me and how I can help through my Amazon best-selling book, *The GrownUps Guide To Running Away From Home. Earn Dollars. Spend Pesos. Live in Paradise.* You can also find out more on my webpage [www.GrownUpsGuide.com](http://www.GrownUpsGuide.com). And my relocation services are detailed on [www.MoveToIsla.com](http://www.MoveToIsla.com).

To start the process, I'd like to know as much as possible about you and your family, and your needs and expectations. That will form the basis of the support we can provide you. So let's get started!

### 1. Who all will be joining you in your relocation?

Full legal name	M/F	Age	Date of Birth	Relationship	Notes
# 1 _____	_____	_____	_____	_____	_____
# 2 _____	_____	_____	_____	_____	_____
# 3 _____	_____	_____	_____	_____	_____
# 4 _____	_____	_____	_____	_____	_____
# 5 _____	_____	_____	_____	_____	_____
Pets? ___ Dogs ___ Cats ___ other. Notes: _____					

### 2. Where will you be moving from, and where will you be moving to?

Where are you moving from? City _____ State _____ Country _____
What city in Mexico do you want to move to? _____
Have you visited there before? <input type="checkbox"/> No <input type="checkbox"/> Yes When? _____ Notes _____
Why did you choose that location? _____
Do you have family/friends there? <input type="checkbox"/> No <input type="checkbox"/> Yes Who? _____

### 3. What do you hope to accomplish with your move?

### 4. Why are you making the move at this time in your life?

### 5. Residency and Visas

To move to Mexico, it is strongly recommended to secure your Permanent or Temporary visa from a consulate in your home country before arriving. When you arrive in Mexico, you must show the immigration officer the visa placed in your passport, and they must issue you an FMM immigration card for just 30 days, and the tiny box “Canje” (meaning exchange) should be checked. This indicates you are in the immigration process, and you are requesting a “Change of Status” entry form. Upon arrival, you have 30 days to go to the local immigration office and start the process to convert your visa into a green card. You will probably want to hire a local Mexican attorney to help you in this process, and they are generally very affordable (around US \$500 for the process). They may even be able to help you schedule an appointment at your local consulate if you are having a problem securing a date. Please tell me about your immigration status and your legal needs:

<p><b>Does everyone have a valid passport with at least 2 years prior to expiration?</b> <input type="checkbox"/>Yes <input type="checkbox"/>No _____</p> <p><b>Have you already secured your residency permit?</b> <input type="checkbox"/>No <input type="checkbox"/>Yes <input type="checkbox"/>Permanent <input type="checkbox"/>Temporary <input type="checkbox"/>Other Date _____</p> <p><b>If not, when do you expect to meet with the Consulate to apply for one?</b> _____</p> <p><b>Would you like a referral to a local immigration attorney?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>Do you have a valid driver’s license with at least 2 years duration?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No Country _____</p> <p><b>Are you planning to ship household goods?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>When and where will they arrive?</b> _____</p> <p><b>Are you planning to bring or ship a car?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>When and where?</b> _____</p> <p><b>Notes or concerns:</b> _____</p>
--

### 6. Housing

The first concern is to have a safe and comfortable place to live, both short term and long term. As a general rule, I recommend a comfortable hotel or Airbnb for a week when you first land. That will give you the time to visit and select optimal mid-term housing, which would be a furnished house, condo or apartment for a couple of months to a year. That will allow you get to know the area, choose the neighborhood you like best, find long-term housing that meets your personal style and provides the amenities you need. If you are shipping household goods from overseas, you may want to transition to an unfurnished home when they arrive. And long term, you may choose to rent or buy a home. But I recommend that you not rush a decision to purchase a home until you have spent at least 6 months to a year acclimating to your new life and trying on different neighborhoods and lifestyle options. So during this first phase of your move, tell me what kind of rental housing you are looking for:

How many bedrooms? \_\_\_\_\_ Type of beds preferred in each room \_\_\_\_\_

# of bathrooms? \_\_\_\_\_ Are walk-in showers okay, or do you require a soaking bathtub? \_\_\_\_\_

Which are acceptable:  Stand-alone house  Apartment  Condo  Efficiency  Other \_\_\_\_\_

Do you consider a swimming pool to be:  A necessity  Very desirable  Not important

What kind of a neighborhood would you like to live in?  Downtown  Residential neighborhood  Secluded

Décor preference?  Contemporary  Classic  Dramatic  Minimalist  Eco  Elegant  Comfortable  Cozy  Cute

What is your desired monthly budget in US\$? \_\_\_\_\_ Maximum budget: \_\_\_\_\_

Notes on housing: \_\_\_\_\_

## 7. Transportation

Once you arrive in your new home, you will want to get out and about, so local transportation will be key. Many expats drive **golf carts**, which are a lot of fun, but expensive (US \$60 per day to rent, US \$5,000 to buy used) and provide no protection in the rain or storage for personal items. Others find **used cars** to be a good solution, and I recommend against buying a new car because cars get banged up easily by golf carts, garbage trucks, running on the sand, driving on unpaved roads, or parking on curbs. You can rent a car in Cancun for US \$50 a day or buy a used car for less than US \$5,000. Lots of folks enjoy **motos** or motor scooters (like mopeds) which are very inexpensive and easy to park on crowded downtown streets. (You can buy a new moto in the supermarket for US \$1,000!) Some people feel comfortable riding **public busses** (inexpensive \$0.50 per trip), taking **taxis** (\$2 - \$4 per trip), or **riding a bicycle**. So what kind of transportation will you be looking for when you first land in Mexico, and then longer term?

**Upon Arrival:**  Rent a golf cart  Rent a car  Rent a moto  Rent a bicycle  Use public transportation

<u>Type of vehicle</u>	<u>New/Used</u>	<u>Max Budget</u>	<u>Notes</u>
# 1 _____	_____	_____	_____
# 2 _____	_____	_____	_____
# 3 _____	_____	_____	_____

**Can you drive:**  Automatic transmission  Manual transmission

## 8. Kids and Schools

If you have children, we can help to find a quality bilingual day care center, and a small international English-speaking Montessori-friendly school through middle school. English-language high schools are available in Cancun. Many parents choose to home school their children, and many can do so through their existing schools due to Covid concerns.

**Do you have children?**  Yes  No **If so, what school year are they in?** \_\_\_\_\_

**Are they attending physical classes or studying only online?** \_\_\_\_\_

**Do you have the option of home schooling them through their old school, or will you withdraw them from school?**  
\_\_\_\_\_

**Do they have any special talents that you wish to nurture?** \_\_\_\_\_

**Do they have disabilities or special needs?** \_\_\_\_\_

**Additional concerns or comments?** \_\_\_\_\_

## **9. Medical Care**

Quality medical care is available by English-speaking doctors on Isla, with a great availability of qualified specialists in Cancun which are easily accessible with a short day trip into Cancun by ferry (which is also a great opportunity to stock up at Costco, Sam's or Walmart, visit Home Depot, or shop at any of a number of upscale shopping malls). Costs for private medical care are a small fraction of what they are in the States, with local doctors who charge US \$25 for an office visit, make house calls, and are available by phone and text message. The same is true with dentists. Most medicines are available locally at a pharmacy without a prescription, and again cost a tiny fraction of what they do back home. Holistic care and chiropractic care, acupuncture, stem cell, nutritional, aromatherapy, chelation, and homeopathic treatments are available in the area. Tell us about your medical conditions, medications, concerns, and needs, so we can help you address them with confidence:

**What special medical needs do you have?** \_\_\_\_\_

**Your spouse?** \_\_\_\_\_

**Your children?** \_\_\_\_\_

**What specialists do you want consult when you arrive in Mexico?** \_\_\_\_\_

**What prescription medications do you want to fill locally?** (I recommend you bring 3 months supply if inexpensive)  
\_\_\_\_\_  
\_\_\_\_\_

**What special medical equipment might you need when you arrive?** \_\_\_\_\_

**Have you gathered your medical records to bring with you, or have them available online?**  Yes  No

**Will your family doctor back home cover you by telemedicine?**  Yes  No

**What medical insurance do you have that will cover you in Mexico** (like Medicare Advantage Plan)? \_\_\_\_\_

**Do you want to buy medical insurance for local coverage?**  Yes  No Go to [www.InsureMyTrip.com](http://www.InsureMyTrip.com) for options

**Any other medical concerns?** \_\_\_\_\_

## **10. Money and Banking**

There are 5 Mexican banks available on Isla, with many more in Cancun. You can open a local bank account with either Temporary or Permanent residency, which will give you a local bank and ATM card. With a local account, you can wire

money from a US or Canadian or other bank account right to your bank with low fees. You can also withdraw cash at any of a number of ATM machines at the banks and at the biggest grocery store (like a small Walmart) but will pay ATM fees (check the fee structure with your current bank account). You may want to transfer your banking to a bank with no ATM fees like USAA or Foreign Service Federal Credit Union, and no wire transfer fees like Bank of America. Some US investment firms limit transactions overseas, so many savvy expats recommend that you transfer your investments to Charles Schwab, where you will get a checking account with a no fee ATM card (it will actually refund all local ATM fees as well). Do NOT tell them you will be moving overseas or they will set you up with an international account which requires a large opening balance. You can also wire yourself money using digital services like Remitly. Tell me about your banking needs:

<b>What bank do you currently use?</b> _____	<b>Do you plan to keep it?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Will you want to open a new local account?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>How do you plan to send yourself money in Mexico?</b> _____	
<b>Where do you hold your investments?</b> _____	<b>Country</b> _____
<b>Will they allow you to transact when overseas?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No _____	
<b>Will you open a new international investment account like Charles Schwab?</b> _____	
<b>Have you already put all your credit cards and payments on auto pay minimum payment?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Any concerns about banking?</b> _____	

### **11. Mobile Phone Service**

Cellular phone service in Mexico is very inexpensive, with international text, call and data plans as low as US\$20 per month, but you need to get a local phone or SIM card and load money onto the phone every month at a store. Many US and global phone carriers include free calling, text, and messaging as part of their basic plans, and expats have good reviews of service by AT&T, Sprint, Verizon, and T-Mobile while keeping their US phone and phone number – but you have to specifically set up an international or Mexico plan before traveling to ensure good rates and coverage. Otherwise your phone can rack up exorbitant charges in just hours and your service may be cut off. Canadian phone services may not work and may be very expensive. Check with your carrier before traveling, and make sure your phone is “unlocked” so you can transfer service if you wish. If you come from an expensive mobile phone market like Canada, you may want to order mobile phone service through a US carrier (while traveling in the States or through a friend there). You may want to get a phone which accommodates 2 SIM cards – a Mexican card and a US card – for optimal flexibility. You may also consider adding a mobile hotspot to your mobile phone account for full-home high-speed connectivity.

<b>What mobile phone service do you currently have?</b> _____	
<b>Is it set up for International or Mexico service?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Do you plan to maintain it or get new service?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Do you plan to keep the same phone number in Mexico, or change to a local Mexican number?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Is your phone “unlocked”?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Do you have a Google Voice number?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Do you have a Skype phone number?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No

## **12. Cable and Internet**

**How important is it to you to get cable TV service in English from back home?** \_\_\_\_\_

**Do you have Amazon prime?** Yes No **NetFlix** Yes No **Hulu** Yes No **Other:** \_\_\_\_\_

**Do you have a VPN?** Yes No **Do you do video conferencing or Zoom calls?** Yes No

**Have you explored a local Hot Spot throughout your phone company?**  Yes  No **How much does it cost?**\_\_\_\_\_

## **13. Sports and Hobbies**

**What sports do family members enjoy?** \_\_\_\_\_

**Do you prefer to watch sports or play sports?** \_\_\_\_\_

**What hobbies do you wish to engage in?** \_\_\_\_\_

**The Arts:**  Dancing  Listen to music Play an instrument Sing Sing Karaoke Paint Sculpture Crafts Write

**Watersports:** Beach Sailing Diving Snorkeling Boating Sunbathing

**Sports:** Tennis Soccer Baseball Basketball Skateboarding Golf Weightlifting Kickboxing Yoga Tai Chi  
Karate Crossfit Running Cycling Zumba Water aerobics  Coaching

**Entertainment:** Board games Bridge Chess Pool

**Academic:** Reading Research Teaching Writing Poetry

**Volunteerism:** Pets Children Medical Ecological Religious Youth Cultural \_\_\_\_\_

## **14. Mail and Postage**

Local delivery of a package or letter mailed in the US or Canada or other country through the Mexican national post office may take 3- 4 months for delivery, with spotty results, and is not recommended. Mexico and Isla are served by all the international premium delivery companies like DHL, UPS, and FedEx. Amazon charges just around US \$10 to ship a package to Mexico from the US, and it is delivered by DHL in about 10 days, so it is often easier to order something from Amazon than to ship it from overseas. You may want to set up digital mail service to ensure you get your mail in a reliable and timely manner. There are a number of companies that offer Digital Mail service. To do this, you may want to find a location close to someone who can pick up physical mail if needed (government documents, credit cards), or arrange to mail them to a trusted source. Change your address to the mailbox address and forward all your mail there ASAP as it takes a long time for all mail to be forwarded. Then you will have access to all your mail in a digital manner to process immediately by simply logging into your account. You may choose to have your digital mailbox in a state which does not collect state income tax, and establish your domicile there to avoid income tax on your worldwide income.

**Where is your mail currently being sent?** \_\_\_\_\_

**Who can pick up or receive your mail there?** \_\_\_\_\_

**Have you found a digital mail service near you?**  Yes  No **Who can pickup special mail there?** \_\_\_\_\_

**Would you like help setting up digital mail service?**  Yes  No

**Do you contemplate changing your state domicile?**  Yes  No

## 15. Businesses You Own

As a general rule, any business that you run remotely, and which sells and bills outside of Mexico, is not governed by the Mexican government and you do not need to report or file taxes on that income. However, if you do business in Mexico, sell and collect money in Mexico, and otherwise engage in economic activity in Mexico, then that business must be registered and reported in Mexico.

Do you have a business you own and will operate remotely while living in Mexico?  Yes  No

What does it do? \_\_\_\_\_

Do you have a business you plan to establish or run from Mexico?  Yes  No \_\_\_\_\_

Do you plan to use it to establish your residency?  Yes  No \_\_\_\_\_

Would you like the contact of a Mexican CPA to help you establish and manage your business?  Yes  No

## 16. Spanish Language Skills

How would you describe your Spanish language skills?  None  Beginner  Some  Intermediate  Fluent

Do you plan to actively learn to speak Spanish?  Yes  No

How would you like to learn?  1-on-1 Tutoring  Online class  Discussion Group  App  Immersion

What help can we give you in the process? \_\_\_\_\_

17. Do you have any other concerns or issues you would like to share at this time?  Yes  No

18. How can I reach you? Name: \_\_\_\_\_ Email Address: \_\_\_\_\_

Phone number: \_\_\_\_\_ WhatsApp: \_\_\_\_\_ Google Voice: \_\_\_\_\_

Facebook messenger \_\_\_\_\_ Zoom: \_\_\_\_\_

Other: \_\_\_\_\_

## 19. You can reach me at:

Diane Huth • [dianehuth@gmail.com](mailto:dianehuth@gmail.com) • +1 (210) 601-7852 • WhatsApp 2106017852

Facebook.com/DianeCHuth • <https://zoom.us/j/2106017852>