

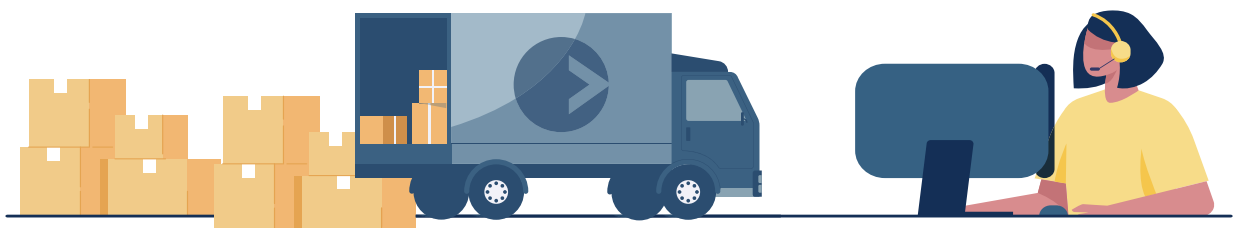
Relocation Checklist - U.S. Domestic



Relocating doesn't have to be stressful.

That's why we've collected everything you'll need to do in the weeks 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.



7-8 Weeks Before You Move

Create either an electronic or hard copy “move” binder

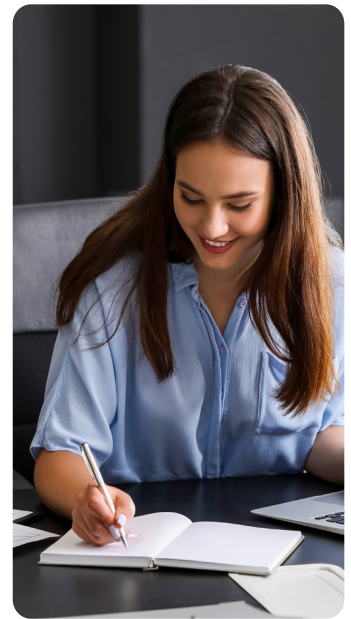
- Track all important move-related paperwork checklists, contracts, receipts, appointments & deadlines

Contact your employer to get information regarding move process

- Will you have professional movers hired to help you?
 - If professional movers are hired, let them pack all your items
- Will you pack yourself?
 - Create and allocate a budget for your move
 - Hire a mover. Get quotes from at least three licensed companies, ask questions:



- Are on-site estimates offered?
- How is pricing determined? What is included in the base price?
- Will the movers pack items? (If so, at what additional cost?)
- Can you purchase boxes or rent packing totes (Eco-friendly option)?
- Identify items that need specialty packing or loading (extra cost?)
- Is the quote binding or non-binding?
- What insurance is included? Will you need moving coverage?
- What additional charges may arise? Request a copy of the signed contract
- Contact your insurance company for additional coverage (optional)



Conduct a room-by-room survey

- 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



Create a master moving inventory sheet and plan

- Design a spreadsheet to track your items
 - It's a good idea to have a new tab or page in your binder for each room
- Assign a color to each room. Mark boxes and furniture with appropriate color or stickers
- Give each box you pack a number and record the number on your inventory list, jotting down notes about contents in the box
 - If you need to find something very quickly, this will help ensure every box is loaded and unloaded off the truck

Pack vital documents and valuables (keep separate and secure)

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

If renting, notify landlord

- Confirm and review rental agreement

Prepare your family

- 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
- Research new schools, schedule in-person visit(s) and transfer school and medical records
- Plan final events and activities for them to create memories with friends
- Arrange childcare/pet care for moving day(s)





5-6 Weeks Before You Move

- Decide on a moving company**
 - Sign and confirm contract
- 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
- 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 as to the move dates?
 - Will your building or street be available or have any restrictions on the day of the move-out/move-in?

- Start packing items you do not use everyday**
 - Pack a little every day, it will reduce stress and not be such an overwhelming job
 - Pick a room and pack up everything you know you won't realistically need or use for the next few weeks
 - Label boxes and add items to your master inventory list
 - Continue sorting items to keep, donate/sell, recycle and discard
 - Back up any files on your local computer drive to the cloud

- Complete any required home improvements**
 - If you're renting, you want to complete so your security deposit is returned

- Complete any travel arrangements**
 - If flying, book flights and hotels
 - If driving, plan your route, hotels, places to stop to eat, gas stations and attractions

- Plan ahead for the new location**
 - Ask medical providers for potential recommendations in the new location
 - Will you require storage at the new location?
 - Will you require home improvements at the new location?
 - Plan and order decor for your new home
 - Do a little reconnaissance
 - Take the time to do some research on the new area you're going to be living in find some points of interest, an after work spot or restaurant to try
 - Research activities, schools and sports for your kids and enroll in advance

- Make time for loved ones**
 - If you're making an interstate or cross-country move, now is the time to start planning goodbyes and gatherings

- Review/Update change of address checklist (on the next page)**
 - Begin to complete all account transfers, cancellation of services or closing of accounts



Coordinate the moving of pet(s), plants, vehicles and firearms

Pets:

- If you have an exotic pet, confirm that it is legal to own in the new state
- For dogs and cats, be sure their shots are up-to-date and that you gather vaccination records before moving
- Research a new veterinarian

Plants:

- Check with your new state's agriculture department for legal and illegal plants
- Many movers will not transport plants, plan to donate prior to move

Vehicles:

- If you're driving across the country, service the vehicle(s)
- If shipping, remove contents in both the interior and the trunk

Firearms:

- Review the state gun laws and regulations and take care of licensing prior to the move

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

- _____
- _____
- _____
- _____



3-4 Weeks Before You Move

- Continue Reviewing/Updating change of address checklist**
- Continue packing**
 - Pack contents of garage, attic, and storage areas, as well as other infrequently used items (for example, seasonal items such as winter or summer clothes, holiday decorations, special dishware/china, decor items like candles or picture frames, etc.)
 - Take pictures of all of your electronics before you unplug them and pack them so they can easily be reconnected correctly after the move

1-2 Weeks Before You Move

- Confirm plans with movers or friends/family**
 - Contact moving company to confirm dates of load, pickup and delivery
 - If friends are helping you move, remind them of the date and time
 - Do not shut off utilities, too soon, in case your moving date changes
- Finish packing (before moving day)**
 - Pack the bulk of your items (designate some boxes as last load)
 - Disassemble big furniture, bag and label all hardware
 - Prepare furniture with padding and floor protection
 - Make sure to keep furniture hardware and foot sliders separate
 - Take the light bulbs out of lamps you're moving
 - Identify unpacking priorities

Do a deep clean

- Dispose of all flammable, corrosives, poisons, paint
- Defrost freezer, clean refrigerator & oven
- Plan meals to use up items you don't intend to move like bulk or frozen foods
- Start to use up items you can't move like detergents, gas, cleaning supplies, etc.
- 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, etc.
- Make sure to pay any fees or penalties, like unpaid parking tickets, legal fees and local or state tax payments
- Return books back to the library
- Take any items that need to be returned to local stores
- Pick up any remaining clothing items from the dry cleaner
- Refill prescriptions

Collect keys, garage door openers and assemble a folder of important information for the new owner(s)

Schedule final walk-through

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

Secure a locksmith so the new home's entrances are changed during move in

- Re-key the locks and change garage door code on keypads and remotes



Move-Out Day

- Keep valuables/heirlooms or difficult items to replace with you**
 - Passports, wills, birth certificates, jewelry, social security cards or irreplaceable items
- 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 the bill of lading and inventory carefully before signing
 - Print an info sheet to include the old/new addresses, directions and your cell number
- If moving yourself**
 - Load your belongings into your moving van strategically (slowly lift by straightening your hips and knees - not your back)
 - As your boxes are labeled, organize them in the van in sections
- Turn off lights and water main valve, record meter reading**
- Ensure all windows and doors are locked**
- Take photos of empty rooms/fitted things for proof of conditions**
- Do any last minute cleaning before handing it to the new owners**
- Once moving van is fully packed, double-check before leaving**
- Leave a note with new address so stray mail can be forwarded**
- Once the transfer is complete return your old property's keys**
- Payment**
 - Get a cashier's check made for the movers if necessary and cash for optional tipping

- 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)



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 van**
- Confirm payment is made**
- 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
- Begin to unpack**
 - Assemble and make beds
 - Set up your key appliances e.g., the fridge and freezer, washing machine, etc.

Moving Day Essential Boxes (Keep Separate/Easy Access)

- Mobile phones and chargers
- Laptops, tablets and chargers
- Medication
- Cleaning supplies
- First aid kit
- Toilet paper
- Paper towels
- Flashlights
- Tape measure
- Toolbox
- Camera
- A few dishes and utensils
- Coffee, teas, and sugar
- Some snacks and water
- Change of clothes
- Childrens' comfort toys
- Bedding/Towels
- Toiletries



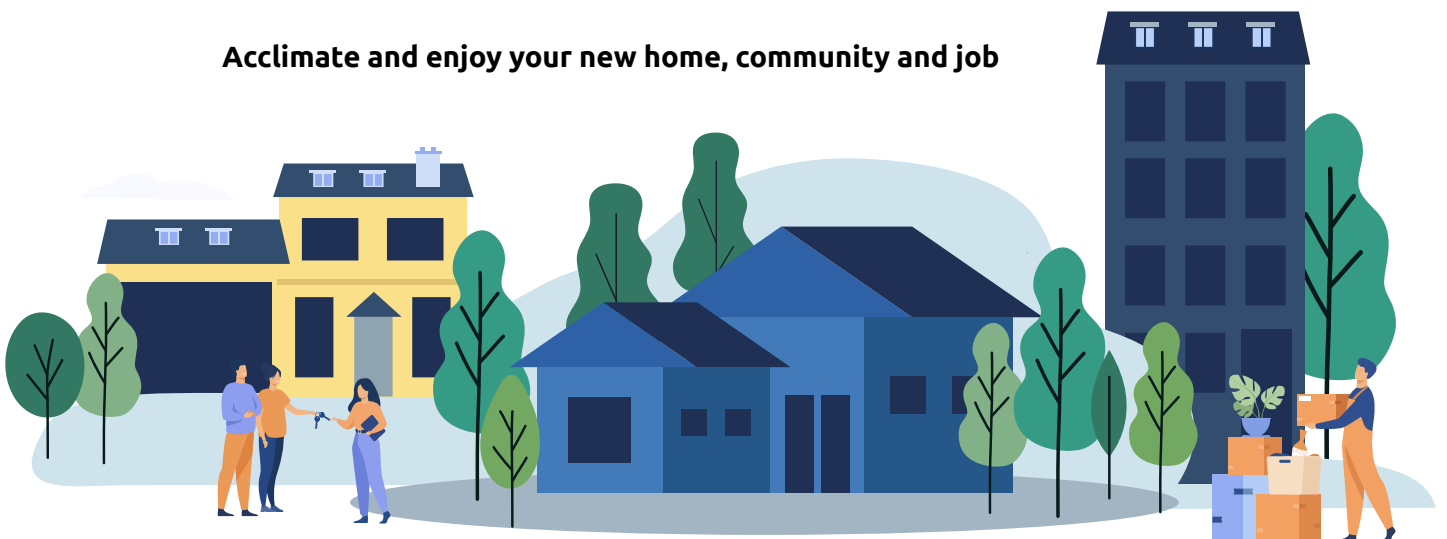
Welcome Home - Getting Settled

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 or return rented packing totes**
- Leave reviews for Moving Company and Realtors**
- Obtain new driver's license and registration**
- Find local services for your home/family – including your pets!**
 - Connect with people in your neighborhood and get recommendations and advice on doctors, locations, services, etc.
 - Join clubs, religious organizations and local sport's teams
 - Ask your Realtor for recommended vendors (plumbers, HVAC, painters, roofers, remodeling companies, electricians, landscapers, etc.)
 - Join your local Nextdoor community
- 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, community and job



Global Mobility Glossary

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

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.



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