



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

Everything You Need for a Seamless Interstate Transition
This isn't just about moving boxes. This is about rebuilding your life in a new city.

12-16 WEEKS BEFORE YOUR MOVE

Strategic Planning Phase

☐ CAREER & EMPLOYMENT TRANSITION

- ☐ Negotiate relocation package details with new employer (lump sum vs. managed, tax implications, start date flexibility)
- ☐ Clarify what relocation expenses are covered (housing search trips, temporary housing, final move, storage, tax gross-up)
- ☐ Request formal offer letter with relocation terms in writing
- ☐ If applicable: Negotiate remote work flexibility for first 30-60 days to ease transition
- ☐ Coordinate notice period with current employer (typically 2-4 weeks for executives)
- ☐ Plan transition strategy for current role (succession planning, knowledge transfer documentation)
- ☐ Schedule exit interviews and maintain relationships (your network follows you everywhere)
- ☐ Update LinkedIn with new position (timing: coordinate announcement with both employers)
- ☐ Request reference letters from current employer while relationship is fresh
- ☐ If applicable: Negotiate retention bonus or sign-on bonus to offset relocation costs

☐ FINANCIAL & LEGAL PLANNING

- ☐ Consult with CPA/tax advisor about multi-state tax implications (some states have no income tax, others are aggressive)
- ☐ Review state tax requirements (filing status, estimated quarterly payments, withholding calculations)
- ☐ Understand property tax differences between states (Texas/New Jersey high vs. Hawaii low)
- ☐ Research sales tax, vehicle registration fees, and other cost-of-living tax impacts
- ☐ If selling home: Interview 3+ realtors, review comparable sales, discuss pricing and timing strategy
- ☐ If keeping home: Research property management companies, understand rental market rates, landlord laws
- ☐ Review mortgage terms (prepayment penalties? Assumable mortgage option for buyer?)
- ☐ Research housing market in new location (rent vs. buy strategy - many executives rent first year)
- ☐ If buying immediately: Get pre-approved for mortgage in new state (rates and lender requirements vary by state)
- ☐ Review all current insurance policies (life, disability, umbrella, homeowners - may need adjustments)
- ☐ Consult estate planning attorney if moving from community property state to common law state (or vice versa)
- ☐ Update will, power of attorney, healthcare directives, and beneficiary designations for new state
- ☐ Research cost of living differences: housing, taxes, healthcare, childcare, utilities, transportation
- ☐ Create realistic moving budget (typical executive interstate move: \$25K-\$75K all-in including temporary housing)
- ☐ Review retirement accounts and investment portfolios (state tax treatment of retirement income varies)
- ☐ If relocating with company: Understand tax implications of relocation reimbursement (most are taxable)

☐ FAMILY CONSIDERATIONS (if applicable)

- ☐ Family meeting: Discuss move openly, address everyone's concerns and fears, get input from all members
- ☐ If school-age children: Research school districts, private schools, magnet programs, gifted programs



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Schedule school visits during housing search trip (absolutely critical for family buy-in)
- ☐ Research extracurricular options in new area (sports leagues, music programs, clubs) before move
- ☐ Create transition plan for children (books about moving, goodbye activities, excitement builders)
- ☐ If spouse/partner employed: Research job market, professional networking groups, executive recruiters
- ☐ Discuss realistic timeline for spouse job search (before move or after? remote work options?)
- ☐ If spouse needs professional licensing (medical, legal, real estate, etc.): Research new state requirements and timeline
- ☐ Plan strategic "goodbye tour" - meaningful time with extended family, close friends, favorite places
- ☐ Create memory projects for children (photo books, videos, scrapbooks of current home and city)
- ☐ Research childcare options if needed (daycare centers, nannies, after-school programs, costs)
- ☐ If teenagers: Discuss driver's license transfer, car insurance changes, college application timeline impacts
- ☐ If elderly parents: Discuss caregiving plan, proximity considerations, healthcare coordination
- ☐ Schedule family counseling or coaching sessions if needed (major transitions are stressful for everyone)

☐ HOUSING STRATEGY

- ☐ Critical decision: Rent first year vs. buy immediately? (Recommendation: Most executives rent 6-12 months)
- ☐ Why rent first: Learn neighborhoods, commute reality, lifestyle fit, prevent costly mistakes
- ☐ If renting: Research 5-7 neighborhoods - walkability, commute times, school districts, lifestyle alignment
- ☐ Identify 3-5 target neighborhoods for housing search trip (variety of options, backup plans)
- ☐ Book housing search trip (typically 3-5 days, coordinate with realtor or rental agent in advance)
- ☐ Research temporary housing options: corporate housing, extended stay hotels, furnished Airbnb
- ☐ Estimate temporary housing duration needed (30-90 days typical, budget \$3K-\$8K/month)
- ☐ If buying: Research mortgage lenders in new state, understand timeline (45-60 days typical)
- ☐ Understand new state's real estate transaction process (attorney states vs. title company states differ significantly)

- ☐ Research HOA regulations, condo fees, property taxes in target neighborhoods

8-12 WEEKS BEFORE YOUR MOVE

Logistics & Vendor Selection Phase

☐ MOVING COMPANY SELECTION

- ☐ Request in-home estimates from 3+ licensed interstate movers (verify USDOT number at [fmcsa.dot.gov](https://www.fmcsa.dot.gov))
- ☐ Verify insurance coverage, claims history, BBB rating, Google/Yelp reviews on multiple platforms
- ☐ Ask critical questions: Binding vs. non-binding estimate? What triggers additional charges? (stairs, long carry, shuttle)
- ☐ Clarify packing options: Full-service packing vs. partial packing vs. self-pack (cost and liability differences are significant)
- ☐ Understand valuation coverage: Released value (minimal, \$0.60/lb) vs. full value protection (more expensive but worth it)
- ☐ If employer managing move: Confirm moving company selection process and your specific responsibilities
- ☐ Request Certificate of Insurance (COI) - required by most apartment buildings and condos
- ☐ Confirm pickup and delivery windows (interstate typically 7-21 day delivery range - plan accordingly)
- ☐ Book move date ASAP (summer = peak season, often 30-50% more expensive, limited availability)
- ☐ Consider alternatives: PODS containers or ABF U-Pack for flexible timing and potentially lower cost
- ☐ Understand weight vs. cubic feet pricing (interstate movers price differently)
- ☐ Clarify what movers will NOT transport: plants, flammables, firearms, perishables, pets
- ☐ Get everything in writing: Estimate, pickup date, delivery window, payment terms, insurance coverage
- ☐ Research moving company reviews specifically for your origin-destination route



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ If selling: Schedule pre-listing home inspection to address issues proactively (avoid deal-killers)
- ☐ If selling: Declutter and stage home professionally (staging increases sale price 5-15%)
- ☐ If renting out property: Research landlord insurance, property management fees (8-10% of rent typical)
- ☐ If renting out: Understand landlord-tenant laws in your state (vary dramatically by location)
- ☐ If currently renting: Review lease carefully for move-out requirements, notice period, deposit return terms
- ☐ Schedule termite/pest inspection if selling (required in many states, better to find issues early)
- ☐ Begin aggressive decluttering: After 10-15 years in one place, you've accumulated too much
- ☐ Be ruthless: If you haven't used it in 2 years, you won't use it in new location
- ☐ Host estate sale or donate high-value items: Furniture, exercise equipment, redundant kitchenware
- ☐ Photograph all valuable items for insurance purposes (before packing, detailed photos)
- ☐ Start using up frozen foods, pantry staples, cleaning supplies (don't move food/chemicals if possible)
- ☐ Research donation options: Goodwill, Salvation Army, Vietnam Veterans, Habitat ReStore, Buy Nothing groups
- ☐ If selling: Make minor repairs that impact sale price: paint touch-ups, broken fixtures, landscaping

☐ **NEW LOCATION RESEARCH (The Part Everyone Underestimates)**

- ☐ Go beyond Google: Schedule video calls or coffee chats with people who actually live there
- ☐ Join local Facebook groups: City newcomers groups, neighborhood-specific pages, parent groups
- ☐ Research healthcare BEFORE you move: Primary care physicians, specialists, dentists (often 2-3 month waits)
- ☐ Identify nearest urgent care and emergency room (know this on Day 1, not when you need it)
- ☐ Research fitness/wellness options: Gyms with your preferred classes, yoga studios, running/cycling routes
- ☐ Identify grocery stores, Target, Costco, pharmacy locations near potential home
- ☐ Research commute realistically: Test route using Google Maps timeline feature at actual work hours
- ☐ Understand traffic patterns: Some cities have brutal rush hours, others don't
- ☐ If applicable: Research houses of worship, cultural organizations, specific community groups
- ☐ Identify 5-7 "places to try": Coffee shops, brunch spots, date night restaurants, casual weeknight dining
- ☐ Research local culture and customs (Southern hospitality vs. Northeast pace vs. West Coast casual = very different)
- ☐ Understand climate and weather patterns: Do you need snow tires? Entirely new seasonal wardrobe? A/C vs. heating?
- ☐ Research state-specific quirks: Some states require vehicle inspections, smog checks, emissions testing
- ☐ Join Nextdoor for your new neighborhood (before you move) to understand community dynamics
- ☐ Research pet regulations if applicable: Breed restrictions, licensing requirements, leash laws, dog parks

☐ **PROFESSIONAL NETWORKING (Start Before You Arrive)**

- ☐ Connect with alumni associations in new city (university, business school, professional organizations)
- ☐ Join LinkedIn groups for new location (city-specific, industry-specific)
- ☐ Reach out to colleagues/former colleagues in new city for introductions and advice
- ☐ Research professional associations and chambers of commerce (plan to join within first 30 days)
- ☐ Identify networking events happening in first 60 days after arrival (mark calendar now)
- ☐ If spouse relocating: Research spouse networking groups, professional organizations, job search resources

6-8 WEEKS BEFORE YOUR MOVE

Administrative & Healthcare Transition Phase

☐ **HEALTHCARE TRANSITIONS (Start Early - This Takes Longer Than You Think)**

- ☐ Request complete medical records from all providers: PCP, specialists, dentist, optometrist
- ☐ Understand records format: Some providers charge fees, some only provide summaries, some take weeks



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Get 90-day prescription refills before leaving (don't rely on finding new providers immediately)
- ☐ Research if your health insurance network changes in new state (it almost always does)
- ☐ If insurance changing: Identify new in-network providers before current coverage ends
- ☐ Transfer prescriptions to pharmacy in new city OR switch to mail-order pharmacy
- ☐ Schedule all pending appointments BEFORE move: annual physical, dental cleaning, eye exam, dermatology
- ☐ If ongoing treatment or chronic condition: Coordinate with current provider for continuity of care plan
- ☐ Request specialist referrals for new location from current providers (they often know colleagues)
- ☐ Update pharmacy profiles with new address and new insurance information
- ☐ If children: Gather complete immunization records and school health forms (required for enrollment)
- ☐ If pregnant: Research ob-gyns and hospitals in new location immediately
- ☐ If mental health care: Find new therapist/psychiatrist before you move (often 1-2 month waitlists)
- ☐ Order extra glasses/contacts before move if needed (takes 1-2 weeks, do it now)
- ☐ Research if new state has different healthcare laws (medical marijuana, reproductive care, etc.)

☐ **SCHOOL TRANSITIONS (if applicable)**

- ☐ Complete enrollment paperwork for new school (often requires proof of residency - get creative if needed)
- ☐ Request official transcripts from current school (may take 2-3 weeks, start early)
- ☐ Transfer IEP or 504 plans if applicable - schedule intake meeting with new school staff
- ☐ Register for fall sports/activities NOW before slots fill up (many register in spring)
- ☐ If high schooler: Notify guidance counselor of move for college recommendation letters, transcript continuity
- ☐ Research AP/IB course availability at new school (may differ from current school)
- ☐ Plan school visit before official start date: building tour, meet teachers, find locker/classroom
- ☐ Order school uniforms if required (some schools have specific vendors, long lead times)
- ☐ Connect children with peer buddies before move: School mentor programs, sports team introductions
- ☐ Join school parent groups on Facebook/email list before arrival (invaluable information source)
- ☐ Research before/after school care options if needed (many have waitlists)
- ☐ Understand school calendar differences (some states start early August, others start after Labor Day)

☐ **ADMINISTRATIVE CHANGES (Research Now, Execute Later)**

- ☐ Research new state driver's license requirements (most states require within 30-60 days of residency)
- ☐ Note specific requirements: Some states require multiple documents, driving tests, knowledge tests
- ☐ Research vehicle registration process and timeline (also typically 30-60 days)
- ☐ Understand if vehicle inspection or emissions testing required (many states require before registration)
- ☐ Research voter registration process (some states allow early registration, others require residence proof)
- ☐ Calculate new state tax withholding (especially if moving from no-income-tax to income-tax state)
- ☐ Update address with IRS (Form 8822 for individual taxes, Form 8822-B for business entities)
- ☐ Schedule utility activation at new location: Electricity, gas, water, trash (2-4 weeks before move-in)
- ☐ Research internet/cable providers in new area: Speeds, pricing, installation lead times (can be 2-3 weeks)
- ☐ Decide on TV service: Cable, streaming, satellite (infrastructure varies by location)
- ☐ Plan utility shut-off at current residence: Don't cancel too early in case move date changes
- ☐ Transfer or close gym memberships (many gyms require 30-day written notice)
- ☐ Update address with ALL banks, credit cards, investment accounts (do this in waves, track carefully)
- ☐ Update address with subscription services: Amazon Prime, Costco, Sam's Club, streaming services
- ☐ Update address with professional licenses, bar associations, industry certifications, designations
- ☐ If freelance/self-employed: Register business in new state if required, understand new tax obligations

☐ **SPOUSE/PARTNER SUPPORT (if applicable)**

- ☐ Have honest conversation about timeline and expectations for spouse job search
- ☐ Research executive recruiters and staffing agencies in new city
- ☐ Identify spouse networking groups and professional organizations



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Update spouse resume and LinkedIn profile with new location
- ☐ Schedule informational interviews with connections in new city
- ☐ Research if spouse profession requires state licensing or certification
- ☐ Discuss financial implications if spouse job search takes longer than expected
- ☐ Identify co-working spaces or coffee shops if spouse will work remotely
- ☐ Plan date nights and quality time during this stressful transition

4-6 WEEKS BEFORE YOUR MOVE

Final Logistics & Arrangements

☐ HOUSING FINALIZATION

- ☐ If renting: Sign lease, pay deposit, confirm move-in date and time
- ☐ If buying: Complete home inspection, negotiate repairs, finalize financing
- ☐ Confirm: Access date, key pickup location, parking availability for moving truck
- ☐ Purchase renters or homeowners insurance (required before closing or move-in)
- ☐ Measure: Doorways, elevators, stairwells at new place (will your furniture fit?)
- ☐ Request floor plan and take photos during walkthrough (for furniture planning)
- ☐ Arrange for lock changes on move-in day (you don't know who has keys)
- ☐ Research parking permits, HOA regulations, building move-in procedures
- ☐ If condo/apartment: Reserve elevator or loading dock for move-in day
- ☐ If gated community: Get moving truck access approved in advance
- ☐ Confirm with new landlord/HOA: Any move-in restrictions? (days/times/truck size)

☐ TRAVEL & MOVING DAY LOGISTICS

- ☐ Book flights OR plan detailed driving route with hotel reservations
- ☐ If flying with pets: Research airline pet policies, book pet travel, get health certificate from vet
- ☐ If driving with pets: Research pet-friendly hotels, plan rest stops, bring comfort items
- ☐ Book hotel for move-in night (you will NOT want to unpack beds on arrival night - trust this advice)
- ☐ Arrange childcare and/or pet care for actual moving days (both ends - this is chaos, protect them from it)
- ☐ Research and schedule first vet appointment in new city (before you need emergency care)
- ☐ Reserve rental car at destination if needed (airport pickup or one-way from origin)
- ☐ Notify neighbors of moving day details: Truck blocking street, early morning activity, noise
- ☐ Exchange contact info with helpful neighbors (you'll appreciate this later)

☐ UTILITY & SERVICE TRANSFERS

- ☐ Schedule utility shut-off at current residence (electric, gas, water) - but NOT too early
- ☐ Confirm utility activation at new residence (schedule 1-2 days before arrival if possible)
- ☐ Schedule internet/cable installation at new home (often 1-2 week lead time, do NOT wait)
- ☐ Port or transfer phone numbers if changing carriers
- ☐ Update address with alarm monitoring company or cancel service
- ☐ Transfer trash and recycling service or confirm municipal pickup schedule
- ☐ If applicable: Cancel lawn care, snow removal, pool service, pest control at current home
- ☐ Research and schedule: Lawn care, snow removal, cleaning service at new home if desired

☐ PACKING STRATEGY & INVENTORY

- ☐ Create master inventory spreadsheet: Room, Box Number, General Contents, Estimated Value
- ☐ Take detailed photos of ALL valuable items before packing (insurance documentation)
- ☐ Separate "pack myself" items: Important documents, jewelry, heirlooms, irreplaceable items
- ☐ Pack "first night box": Sheets, towels, toiletries, phone chargers, medications, snacks
- ☐ Pack "first week box": Paper towels, toilet paper, basic tools, cleaning supplies, trash bags



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Pack "first week kitchen box": Coffee maker, coffee/tea, paper plates, plastic utensils, dish soap
- ☐ Label boxes THREE ways: Room destination, priority level (open first/open later/storage), contents summary
- ☐ Use color-coding system for rooms (makes moving day much faster)
- ☐ Start using up: All frozen foods, bulk pantry items, cleaning supplies you don't want to move
- ☐ Donate or sell: Furniture that won't fit in new space, items that don't match new home's style
- ☐ Donate or sell: Clothing that doesn't match new climate (heavy coats moving to Florida? Donate them)
- ☐ If moving to smaller space: Rent storage unit at destination and plan what goes there vs. new home
- ☐ Photograph how electronics are connected before unplugging (TV, computer, router setup)
- ☐ Back up ALL computer files to cloud storage (OneDrive, Google Drive, Dropbox, iCloud)

☐ **FINANCIAL PREPARATIONS**

- ☐ Notify ALL banks and credit unions of address change (avoid fraud alerts on move)
- ☐ Order checks with new address if needed (many banks need 2-3 weeks)
- ☐ Gather important financial documents: Tax returns, investment statements, insurance policies
- ☐ Create digital copies of important documents (passport, birth certificates, marriage license, etc.)
- ☐ Withdraw cash for moving day tips: \$100-200 in \$20 bills (tip movers 15-20% of cost, in cash, individually if possible)
- ☐ Set aside cash for first few days in new city (don't rely on finding ATM immediately)
- ☐ If selling home: Coordinate closing date with moving date (ideally move first, close second)

2-4 WEEKS BEFORE YOUR MOVE

Final Preparations & Closing Loose Ends

☐ **CURRENT HOME CLOSEOUT**

- ☐ Deep clean entire home OR hire professional cleaners (critical for deposit return if renting)
- ☐ Clean areas often neglected: Inside cabinets, baseboards, windows, light fixtures, ceiling fans
- ☐ Touch-up paint, patch all nail holes, repair minor damage (spackle, sand, paint)
- ☐ If renting: Schedule final walk-through with landlord (bring checklist and camera)
- ☐ Take comprehensive photos/video of home in clean, empty state (proof of condition at departure)
- ☐ If selling: Complete any negotiated repairs, have receipts ready
- ☐ Return all borrowed items: From neighbors, friends, family, library
- ☐ Pick up all items in repair: Watch repair, shoe repair, alterations, dry cleaning
- ☐ Empty storage units and cancel rental (don't pay for extra month you won't use)
- ☐ Cancel ALL local services: Gym membership (30-day notice usually required), house cleaning, pest control
- ☐ Cancel subscription boxes and deliveries (meal kits, wine clubs, flower subscriptions)
- ☐ Schedule mail hold or forwarding starting from move date (USPS forwards free for 1 year)
- ☐ Defrost freezer 24-48 hours before move (clean and dry completely)
- ☐ Run dishwasher and washing machine with cleaning cycle (leave doors open to air dry)

☐ **NEW HOME ADVANCE PREPARATION**

- ☐ Absolutely confirm: Lease start date or closing date (verify in writing multiple times)
- ☐ Triple-check: Utility activation dates (electricity, gas, water, internet/cable)
- ☐ Confirm internet installation appointment (this is often the #1 thing that goes wrong)
- ☐ Order furniture for new space if needed (measure EVERYTHING - doorways, elevators, stairs)
- ☐ Research window treatments: Will you need them immediately for privacy or sun control?
- ☐ If buying home: Schedule home inspection, appraisal, final walk-through (coordinate with realtor)
- ☐ If buying: Open accounts at local bank or credit union (helpful for certified checks, local relationships)
- ☐ Arrange lock changes on move-in day (schedule locksmith in advance - don't wait)



SER-CUL’S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Research building move-in procedures: Reserve elevator, get Certificate of Insurance to building management
- ☐ Research parking: Guest parking permits, resident permits, overnight parking rules
- ☐ If new construction: Understand what's included and what you need to buy (appliances? window treatments? etc.)

☐ **ADDRESS CHANGE NOTIFICATIONS (The Tedious But Critical Part)**

- ☐ Submit USPS change of address (online at usps.com or at post office, starts date you specify)
- ☐ Update voter registration (register in new state, cancel in old state)
- ☐ Notify Social Security Administration of address change (if receiving benefits)
- ☐ Update address with Department of Motor Vehicles (even if not transferring license yet)
- ☐ Notify IRS: File Form 8822 (individuals) or Form 8822-B (businesses)
- ☐ Update address with: Accountant, attorney, financial advisor
- ☐ Update all insurance: Health, dental, vision, life, disability, auto, homeowners/renters
- ☐ Update address with: All banks, all credit cards, all investment/retirement accounts
- ☐ Update address with: Loan servicers (mortgage, auto, student loans, personal loans)
- ☐ Notify employer of address change (for W-2, payroll, benefits administration)
- ☐ Update: Amazon, eBay, Etsy, and any other shopping accounts
- ☐ Update: All streaming services (Netflix, Hulu, HBO, Disney+, etc.)
- ☐ Update: All subscription services (newspapers, magazines, newsletters, apps)
- ☐ Update: Airline frequent flyer programs (miles won't transfer, but profile needs update)
- ☐ Update: Hotel loyalty programs, AAA, Costco, Sam's Club
- ☐ Update: Professional organizations, alumni associations, licensing boards
- ☐ Notify: Children's schools (for transcripts, records, communications)
- ☐ Notify: Medical providers, pharmacies, veterinarian
- ☐ Update: Emergency contacts for all family members
- ☐ Notify: Friends and family (send email blast or moving announcements)

☐ **FINAL ADMINISTRATIVE TASKS**

- ☐ Pay any outstanding tickets, fines, fees in current location (don't let these follow you)
- ☐ Close local library card, return all books and materials
- ☐ Return all store rental items (carpet cleaners, tools, equipment)
- ☐ Cancel newspaper and magazine subscriptions (or update address)
- ☐ Unsubscribe from local email lists and community calendars
- ☐ Leave forwarding email address with HOA, building management, or landlord (for stray mail)

1 WEEK BEFORE YOUR MOVE

Final Week Countdown

☐ **FINAL LOGISTICS CONFIRMATION**

- ☐ Confirm moving company arrival time and contact info (get driver's cell phone)
- ☐ Confirm delivery window at destination (and driver's cell phone for destination)
- ☐ If self-moving: Confirm truck rental reservation and pickup time
- ☐ Reconfirm utility activation dates at new home (call each utility provider)
- ☐ Reconfirm internet installation appointment (call provider, verify tech is scheduled)
- ☐ Reconfirm: Hotel reservations, flight times, rental car reservation
- ☐ Share moving day plan with family members (everyone should know the schedule)
- ☐ Set up mail forwarding starting date (verify with USPS one more time)



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

☐ FINAL PACKING

- ☐ Pack everything except absolute essentials for next 7 days
- ☐ Keep aside: Changes of clothes, medications, toiletries, important documents, valuables
- ☐ Defrost freezer completely (do NOT pack wet freezer)
- ☐ Disconnect all electronics and bag/label cords (photograph first for easy reconnection)
- ☐ Disassemble furniture that needs it (bag and label ALL hardware - tape bags to furniture if possible)
- ☐ Pack car: Valuables, important documents, first-night box, medications, snacks, chargers
- ☐ Set aside cleaning supplies for final clean after movers leave
- ☐ Fill prescriptions one more time (90-day supply if possible)
- ☐ Withdraw cash for moving day tips (have bills separated in envelopes)
- ☐ Charge all devices (phones, tablets, laptops, Kindles, etc.)
- ☐ Download movies, podcasts, audiobooks for travel

☐ GOODBYES & FINAL MEMORIES

- ☐ Take photos of home, neighborhood, favorite spots (especially for children's memory books)
- ☐ Host final gathering with close friends (low-key, emotional closure)
- ☐ Exchange contact info with neighbors you want to stay connected with
- ☐ Visit favorite local spots one last time (your coffee shop, park, restaurant)
- ☐ Let children say goodbye to friends, teachers, coaches (closure is important)
- ☐ Thank people who have helped you (neighbors, friends, service providers)
- ☐ Leave positive reviews for local businesses you appreciated

MOVING DAY - ORIGIN

The Big Day: Loading

☐ BEFORE MOVERS ARRIVE

- ☐ Do final sweep: Check all closets, cabinets, garage, attic, basement, storage areas
- ☐ Take photos/video of home before movers arrive (proof of condition)
- ☐ Post signs: Which items go (marked with colored stickers), which items stay
- ☐ Have floor plan ready for movers showing where to load priority items
- ☐ Keep essentials accessible: Phone, chargers, snacks, water, cash for tips
- ☐ Arrange childcare/pet care (keep them away from chaos and open doors)

☐ DURING LOADING

- ☐ Be present entire time (or have trusted representative supervise)
- ☐ Review inventory list as items are loaded (every single item should be documented)
- ☐ Take photos of valuable items before they go on truck (especially furniture condition)
- ☐ Ask questions if you're unsure about something (professional movers appreciate clarification)
- ☐ Keep paperwork organized: Inventory, bill of lading, contact info, insurance info
- ☐ Tip movers at origin if appropriate (check if same crew will unload at destination)
- ☐ Take final photos of empty home before leaving

☐ FINAL HOME CLOSEOUT

- ☐ Turn off all lights (walk through every room)
- ☐ Close and lock all windows
- ☐ Set thermostat appropriately (some leases specify this)
- ☐ Turn off water main valve if instructed
- ☐ Take final meter readings (gas, electric, water) and photograph them
- ☐ Lock all doors (check every single one)
- ☐ Return keys as arranged: Drop box, leave for realtor, mail to landlord



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- ☐ Leave note with forwarding address for new occupants (stray mail happens)
- ☐ Do one final walk around outside: Close garage door, gate, nothing left behind
- ☐ Take photo of yourself in front of house (mark this chapter of your life)
- ☐ Allow yourself to feel the emotions (this is a big moment)

TRAVELING TO NEW HOME

The Journey

☐ IF DRIVING

- ☐ Have car serviced before trip (oil change, tire pressure, fluids checked)
- ☐ Plan route with interesting stops (especially important with children)
- ☐ Have playlist/podcasts/audiobooks downloaded
- ☐ Pack car snacks and drinks (lots of water, healthy options)
- ☐ If pets: Plan for rest stops every 2-3 hours, bring water bowl, waste bags
- ☐ Keep important documents accessible (license, registration, insurance, move paperwork)
- ☐ Have phone chargers for everyone (car chargers and portable battery packs)
- ☐ Plan hotel check-in times (arrive before kids/pets get too tired)

☐ IF FLYING

- ☐ Check in exactly 24 hours before flight (earlier check-in = better seat selection)
- ☐ If pets: Arrive 2+ hours early (pet check-in takes time)
- ☐ Pack snacks and entertainment (airport food is expensive and limited)
- ☐ Download entertainment for flight (movies, books, games)
- ☐ Wear comfortable clothes (you're exhausted, be kind to yourself)
- ☐ Keep medications and important documents in carry-on (never in checked luggage)

MOVING DAY - DESTINATION

The Big Day: Unloading

☐ BEFORE MOVERS ARRIVE

- ☐ Walk through new home BEFORE movers arrive (document condition with photos/video)
- ☐ Check that utilities are working: Electricity, water, gas, HVAC
- ☐ Test hot water, flush toilets, run faucets (make sure plumbing works)
- ☐ Check that locks work, get keys if you don't have them
- ☐ Test garage door opener (if applicable)
- ☐ Locate: Main water shut-off valve, circuit breaker panel, HVAC controls (know where these are)
- ☐ Check smoke detectors and carbon monoxide detectors (install batteries if needed)
- ☐ Have floor plan ready showing where furniture should be placed (this prevents multiple moves)
- ☐ Post room labels if helpful (especially if house is large or layout is confusing)
- ☐ Set out: Water and snacks for movers (they'll appreciate it)

☐ DURING UNLOADING

- ☐ Be present for entire unloading (or have trusted representative supervise)
- ☐ Check items off inventory list as they come off truck (every single item)
- ☐ Inspect for any damage before signing delivery receipt (take photos immediately)
- ☐ Direct movers where to place furniture (have them place it right the first time)
- ☐ Check inside boxes for visible damage before movers leave (especially for valuables)
- ☐ Ask movers to place boxes in correct rooms (makes unpacking much easier)
- ☐ Review bill of lading carefully before signing (read every word)



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Document any damage or missing items on paperwork before signing
- ☐ Tip movers at destination (15-20% of total cost, cash, individually if possible)
- ☐ Keep all paperwork: Inventory, bill of lading, receipts (needed for any claims)

☐ IMMEDIATE PRIORITIES (First 4 Hours)

- ☐ Make beds (you'll be exhausted tonight - set these up first)
- ☐ Set up bathrooms: Shower curtain, towels, toiletries, toilet paper
- ☐ Unpack first-night essentials box
- ☐ Set up coffee maker (you'll need coffee tomorrow morning)
- ☐ Find phone chargers and set up charging station
- ☐ Order dinner (don't even think about cooking - you've earned takeout)
- ☐ Take showers and get ready for bed (even if it's 7pm, that's okay)
- ☐ Check that doors and windows lock properly before sleeping
- ☐ Set up one comfortable seating area (couch or chairs - you need somewhere to sit)
- ☐ Locate: Nearest open store, restaurant, gas station, pharmacy (in case you need something urgently)

FIRST WEEK IN NEW HOME

Beyond Unpacking Boxes (The Part Everyone Underestimates)

☐ IMMEDIATE HOUSEHOLD SETUP (Days 1-3)

- ☐ Major grocery shop: Coffee, breakfast items, easy lunch/dinner options, snacks, drinks
- ☐ Locate nearest: Gas station, pharmacy, ATM, post office, hardware store, grocery store
- ☐ Set up internet and router (you need this working ASAP)
- ☐ Set up TV and streaming devices (you'll need downtime)
- ☐ Unpack kitchen essentials: Coffee maker, dishes, utensils, pots, pans
- ☐ Stock bathrooms: Toilet paper, paper towels, soap, shampoo, cleaning supplies
- ☐ Make sure you have: Trash bags, paper towels, cleaning supplies, basic tools
- ☐ Set up laundry area (detergent, dryer sheets, hampers)
- ☐ Install shower curtains, toilet paper holders, towel bars
- ☐ Test all appliances: Stove, oven, dishwasher, washer, dryer, garbage disposal
- ☐ Test all outlets, switches, and fixtures (note any issues for landlord)
- ☐ Set up workspace if working from home (desk, chair, computer, printer)
- ☐ Unpack clothes (at least enough for first week)
- ☐ Find: Where did movers put the box you need right now? (this happens to everyone)

☐ CRITICAL ADMINISTRATIVE TASKS (Days 1-7)

- ☐ Update driver's license (most states give you 30-60 days but do it early)
- ☐ Register vehicles (bring title, insurance proof, smog certificate if required)
- ☐ Register to vote (online or at DMV, do it same day as license if possible)
- ☐ Update car insurance with new address (rates may change based on location)
- ☐ Find and establish: New bank branch, pharmacy, dry cleaner, car wash
- ☐ File USPS change of address if not done yet (starts 2-3 weeks after submission)
- ☐ Update address with Amazon, Google, Apple ID with new address
- ☐ Locate nearest: Urgent care, emergency room, 24-hour pharmacy (before you need them urgently)
- ☐ Test your commute to work at actual times (don't wait until first day to discover traffic)
- ☐ Introduce yourself to immediate neighbors (knock on doors, bring cookies, be friendly)
- ☐ If apartment: Locate mailbox, understand mail delivery system, get keys if needed
- ☐ If house: Understand trash/recycling pickup days and rules
- ☐ Locate fire extinguisher or purchase one immediately (safety first)



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Change HVAC filters (new home, fresh start, cleaner air)
- ☐ Set up: Smoke detector batteries, carbon monoxide detector batteries
- ☐ Test home security system if you have one (understand how it works)

☐ **UNPACKING STRATEGY (Days 1-7)**

- ☐ Unpack by priority: Bedrooms, bathrooms, kitchen first (in that order)
- ☐ Unpack one room at a time (feels like progress vs. chaos everywhere)
- ☐ Break down boxes as you go (don't let them pile up)
- ☐ Arrange furniture before unpacking (moving empty furniture is easier)
- ☐ Hang curtains/blinds early (privacy and light control)
- ☐ Set up closets with organization system (do it right from the start)
- ☐ Create donation pile as you unpack (things that don't fit or don't make sense)
- ☐ Don't strive for perfection (good enough is fine for now)

FIRST 30 DAYS IN NEW HOME

The Integration Phase (Where Most People Fail)

CRITICAL TRUTH: The boxes get unpacked. The utilities get turned on. The driver's license gets updated. But 90 days later, you still don't know anyone. You haven't found "your" coffee shop. You eat lunch alone. Your spouse is isolated. Your kids are lonely. **This is why 30% of executive relocations fail** - and this is exactly what Ser-Cul prevents.

☐ **PROFESSIONAL INTEGRATION (Weeks 1-4)**

- ☐ Schedule 1-on-1 meetings with all direct reports in first 2 weeks (don't wait for them to reach out)
- ☐ Schedule introduction meetings with key stakeholders across organization
- ☐ Learn names and roles: Executive assistants, facilities team, IT support (they run the place)
- ☐ Identify company culture norms: Email response time expectations, meeting style, dress code
- ☐ Observe: Where do people eat lunch? Take coffee breaks? Gather after work?
- ☐ Join: Employee resource groups (ERGs), professional development programs, company sports teams
- ☐ Ask this question to multiple people: "What should I know that no one will tell me?" (most valuable question you'll ask)
- ☐ Establish routines: Commute routine, morning routine, lunch routine (consistency reduces stress)
- ☐ Find: Dry cleaner near office, lunch spots, coffee shop for working remotely
- ☐ Attend: Company social events, happy hours, team activities (yes, even when you're tired)
- ☐ Be visible: Eat in company cafeteria, take walking meetings, show up (people need to know you)
- ☐ Schedule informal coffee chats with peers in other departments (build cross-functional relationships)

☐ **COMMUNITY BUILDING (The Part No One Does - But You Must)**

- ☐ Join gym or fitness studio within first 2 weeks (fitness classes create automatic routine connections)
- ☐ Attend: Local networking events, industry meetups, alumni chapter gatherings
- ☐ Find: Running club, cycling group, hiking group, or other active social activity
- ☐ Visit different local coffee shops until you find "yours" (this becomes your third place)
- ☐ Identify favorites: Brunch spot for weekends, date night restaurant, casual weeknight dinner place Explore: Farmers markets on weekends, street fairs, neighborhood festivals
- ☐ Join: Nextdoor app, neighborhood Facebook groups, local community app
- ☐ Visit: Public library (free resources, community events, quiet workspace)
- ☐ Find: Local bookstore, community center, cultural centers
- ☐ Establish patterns: Your pharmacy, your grocery store, your gas station (routine creates comfort)
- ☐ Attend: City council meetings or neighborhood association meetings (understand local issues)
- ☐ Volunteer: Local nonprofit, community cleanup, food bank (meet purpose-driven people)



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Say yes to invitations (even when you're tired - relationships require effort)
- ☐ Host: Coffee at your home with new neighbors (even if not fully unpacked)
- ☐ Create: Weekly routine of going to same coffee shop, same time (consistency = recognition = connection)

☐ **HEALTHCARE ESTABLISHMENT (Weeks 1-4)**

- ☐ Schedule appointment with new primary care physician (don't wait until you're sick)
- ☐ Schedule: Dentist appointment, eye exam, any specialist follow-ups
- ☐ Transfer prescriptions to new pharmacy (bring prescription bottles to new pharmacy)
- ☐ Establish: New therapist or counselor if needed (relocation is stressful, get support proactively)
- ☐ If children: Schedule pediatrician appointment, transfer medical records
- ☐ If pets: Schedule vet appointment, transfer records, understand emergency vet options
- ☐ Research: Physical therapy, chiropractic, massage therapy if you use these regularly
- ☐ Find: Preferred urgent care center (visit once to understand location, hours, process)

☐ **FAMILY INTEGRATION (if applicable - Weeks 1-4)**

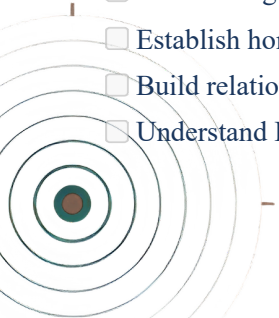
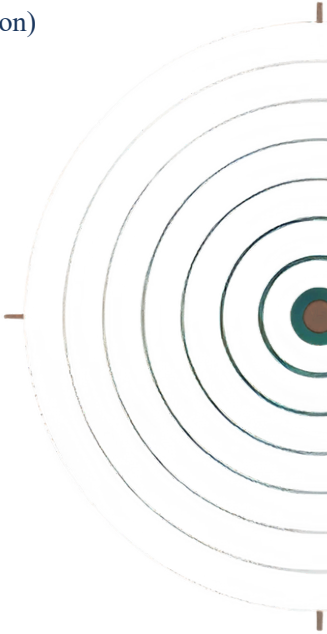
- ☐ Schedule: Family weekend outings to explore city (parks, museums, attractions, waterfront)
- ☐ Find: Ice cream shop, pizza place, favorite park (places kids want to return to)
- ☐ Attend: All school events, back-to-school night, parent orientation
- ☐ Join: PTA, parent associations, sports team parent groups (parents are your social entry point)
- ☐ Arrange: Playdates for children proactively (don't wait for invitations - you initiate)
- ☐ Find: Babysitters through Care.com, local parent groups, church, neighbors
- ☐ Identify: Kid activities and register immediately (sports, music, clubs - commitment creates connection)
- ☐ Create: Weekend family routines (Saturday farmers market, Sunday park, Friday pizza night)
- ☐ Schedule: Quality family time to process transition together (everyone is adjusting)
- ☐ Check in: Regular conversations with each family member about how they're doing
- ☐ If spouse: Support spouse's job search, networking, social connections actively
- ☐ If teenagers: Help them get involved quickly (sports, clubs, part-time job)
- ☐ Make home feel like home: Hang family photos, create cozy spaces, establish family traditions

☐ **PERSONAL WELL-BEING (The Part You'll Neglect - Don't)**

- ☐ Schedule routine appointments: Primary care physician, dentist, optometrist (establish care)
- ☐ Find therapist or counselor (seriously - this transition is harder than you think it will be)
- ☐ Maintain exercise routine (stress management is critical - this is not optional)
- ☐ Protect sleep schedule (exhaustion makes everything harder, 7-8 hours minimum)
- ☐ Create personal time daily (even 30 minutes alone - walk, read, meditate, whatever restores you)
- ☐ Stay connected: Regular video calls with old friends, family back home (don't lose your support system)
- ☐ Give yourself grace: This is genuinely hard and takes real time (6-12 months to feel settled is normal)
- ☐ Allow emotions: It's okay to miss your old home while building your new one
- ☐ Celebrate small wins: You found a favorite coffee shop! That's actually a big deal.
- ☐ Be patient with yourself and your family (everyone adjusts at different speeds)

☐ **HOME ORGANIZATION & SETTLING**

- ☐ Hang artwork and photos (makes it feel like YOUR home, not just a place)
- ☐ Organize closets and storage (done right once vs. poorly forever)
- ☐ Set up home office if working remotely (ergonomic chair, proper lighting, organized workspace)
- ☐ Create functional entryway: Hooks for keys, spot for mail, shoe storage
- ☐ Establish cleaning routine (weekly schedule, supplies stocked, habits formed)
- ☐ Schedule regular house cleaning service if budget allows (one less thing to manage)
- ☐ Establish home maintenance routine: HVAC filter changes, gutter cleaning, yard care
- ☐ Build relationship with: Handyman, plumber, electrician, HVAC tech (before emergency)
- ☐ Understand HOA rules if applicable (trash days, quiet hours, parking, guest policies)





SER-CUL’S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- ☐ Join neighborhood watch or community group (safety and connection)

60-90 DAYS POST-MOVE

Building Your New Life

- ☐ **DEEPENING COMMUNITY ROOTS**
 - ☐ By now you should have: 2-3 "regular spots" you go to weekly (coffee shop, gym, restaurant)
 - ☐ By now you should know: 3-5 people by first name outside of work (neighbors, gym friends, parents)
 - ☐ Host: Housewarming gathering (invite neighbors, colleagues, new friends - even if still settling in)
 - ☐ Join: Board of local nonprofit, volunteer organization, professional association
 - ☐ Establish: Trusted local service providers (dentist, mechanic, hair stylist, home repair contacts)
 - ☐ Create: Weekly routine that feels like home (you have favorite spots, predictable patterns)
 - ☐ Explore: Weekend trips to nearby cities or attractions (day trips, regional exploration)
 - ☐ If spouse: Proactively check in on adjustment, job search progress, social connections
 - ☐ If children: Honestly assess friend development, school adjustment, emotional well-being
 - ☐ Initiate: Invitations to new friends (coffee, dinner, kids' playdates - be the organizer)
- ☐ **EVALUATING AND ADJUSTING**
 - ☐ Honest assessment: Do we love this neighborhood? (It's okay to move within the city in first year)
 - ☐ If renting: Evaluate if you want to buy now that you know the area better
 - ☐ Reflect: What's working well? What's not? What needs adjustment?
 - ☐ Revisit: Work commute - is there a better route? Can you work from home more?
 - ☐ Financial check: Are costs higher or lower than expected? Budget adjustments needed?
 - ☐ Celebrate: You did it. You relocated. You're building a new life. (Seriously - acknowledge this achievement)
 - ☐ Remember: Full adjustment takes 6-12 months (you're not failing if it still feels hard at 90 days)
 - ☐ Be patient: Feeling "at home" is a process, not an event

WHAT MOST EXECUTIVES MISS (And Why 30% of Relocations Fail)

THE HARD TRUTH: Companies help you move. They don't help you belong.

Traditional relocation packages cover:

- Moving truck
- Temporary housing
- Realtor fees
- Maybe some home-finding trips

They DON'T cover:

- Finding your community
- Building your network
- Integrating your family
- Establishing your routines
- Creating your life

The boxes get unpacked. The job starts. The address changes. But:



SER-CUL'S COMPREHENSIVE EXECUTIVE RELOCATION CHECKLIST

- You're eating lunch alone 6 months later
- Your spouse is isolated and lonely
- Your kids are struggling to make friends
- You still don't know where to get a good haircut
- You haven't found "your people"
- You're already browsing job boards

This isn't a logistics problem. This is a HUMAN problem. And logistics solutions don't solve human problems.

HOW SER-CUL IS DIFFERENT We Take Care of the PERSON (Not Just the Logistics)

What we actually do:

- ✓ **Premium Housing Coordination** - We find the right neighborhood for your lifestyle, not just the right price point. We understand school districts, commute realities, social fit.
- ✓ **White Glove Concierge Services** - We cover the details to ensure your comfort: groceries in the fridge, dry cleaning dropped, dual monitor work station, regular home cleaning. You focus on your success, we focus on you.
- ✓ **Community Integration** - We introduce you to people, places, and routines. Your coffee shop. Your gym. Your running group. Your social entry points.
- ✓ **Family Support** - We help spouses navigate job searches or career pivots. We help kids make friends before school starts. We support the whole family's transition.
- ✓ **Professional Networking** - We connect you to your industry peers, your alumni chapter, your professional community. You don't eat lunch alone.
- ✓ **Lifestyle Building** - We help you find your rhythm: Weekend routines, favorite restaurants, cultural venues, recreational activities that fit YOUR life.
- ✓ **6-12 Month Advisory** - We don't disappear after 30 days. We check in regularly, adjust strategies, provide support until you're genuinely thriving.

The difference:

- **Relocation companies** handle the move (30 days, then done)
- **Executive coaches** develop your leadership (but not your life integration)
- **Ser-Cul** takes care of the PERSON (6-12 months of sustained support)

Managing This Entire Checklist By Yourself?

You could spend 200+ hours over 6 months managing every detail on this checklist. OR You could focus on excelling in your new executive role while we handle the human element of your transition.

That's what Ser-Cul does.

We've relocated 6 times. We know what you're missing. We know what everyone else skips.

And we make sure you don't just move. You thrive.

CONTACT SER-CUL EXECUTIVE SERVICES

Elizabeth Louis
Founder & CEO

Q1 2025 Early Registration Pricing Available

Premium housing coordination • Community integration • Family support • Professional networking • 6-12 month advisory

*Because companies develop the employee. Coaches develop the executive. Relocation companies move the stuff. **Ser-Cul takes care of the person.***

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