

# RELOCATION CHECKLIST

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If you are planning a relocation, you need a checklist to manage all the details you have to consider before and throughout the process - finding a REALTOR at both ends, selling your home, finding a new home, organizing for the move, packing, getting rid of things you don't want, selecting a mover, dealing with the move itself, and unpacking in your new home (which could include storage).

## Record Keeping

- Create a file or other place to keep all of your receipts; written records will likely be required for your Relocation Company and will come in handy for tax purposes if you qualify for a moving deduction

## Preparing for the Move

- Select a REALTOR to help you market your current home. *If you are working with a relocation package check on any requirements by the Relocation Company - some may dictate which agent or brokerage you use*
- Select a REALTOR who knows about relocation to help buy your new home at your new location. *Again, check on the requirements if using a Relocation Company.*
- Plan at least 1 house-hunting trip. *This may be included if you are working with a relocation package - be sure to check on the requirements including time limits, housing and transportation, expenses covered, etc.*
- Determine, with your REALTOR'S help if needed, where you are going to look
- Get pre-approved or obtain an updated pre-approval letter if you need financing
- Arrange for funds for deposits, etc.
- Decide on what you are looking for in your new home and community, and the trade-offs vs. must-haves. *Use my "What's Important to You Questionnaire" and "Buyer's Lifestyle Questionnaire"*



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## Choosing a Moving Company

- If you are using a Corporate Relocation Package, check with your contact person to find out the process they require.
- Select 2, preferably 3, reputable moving companies to obtain estimates
- Prepare a list of questions to ask each moving vendor - dates for packing, loading and the journey; insurance; packing services they provide; allowed and disallowed items; need for additional insurance; need for a shuttle truck; time and cost of storage at new location; will insurance cover things you pack yourself. *See my "Questions to Ask Your Mover" Questionnaire*
- Schedule estimate visits well in advance of the move if possible
- Request references from each vendor and contact them
- Review estimates and compare them. *If a vendor doesn't get back in touch promptly, drop them!*
- Decide on the vendor you wish to use or consult with the Relocation Company
- Schedule pack/load/move dates and mark dates on your calendar. *Try to avoid end of month if possible.*

## Packing for the Move

- Determine if you will have the moving company pack as part of their services and if there is an additional cost
- Throw away items you do not want that you cannot donate
- Donate items wherever possible - Salvation Army, Veterans, church groups, homeless shelters - many places will come and pick-up donations
- Consider 1-800-GotJunk or other vendor to haul away larger piles of trash for a fee
- Consider a dumpster from your local trash service, if needed.
- Consider an estate sales service or liquidator depending on your needs and timing
- Donate electronics to Best Buy or other eWaste facility in your community
- Obtain boxes for personal packing (movers call this PBO or "packed by owner")
- Buy packing paper or use newspaper - be aware of the ink and that newsprint is rather dirty
- Buy rolls of packing tape and markers to label boxes
- Start packing room by room, labeling the contents as you go
- Label each box with the appropriate room, e.g. living room



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### Planning the Trip to Your New Home

- Decide if you are going to drive or fly (*this may depend on the relocation package - coordinate with the appropriate person*)
- Determine the LEAVE and ARRIVAL dates based on availability of your new home, interim housing (*if a corporate relocation*), staying with family, etc.
- Plan your route including hotels, miles to travel each day, sites you would like to see, family to visit, etc. *Consider using AAA for a TripTik, tourist guides for the states you will travel through, etc.*
- Get the car tuned up to make sure it is ready for a long journey, especially tires, brakes, and AC/heater
- Make sure your car insurance will cover the trip and the policy is current
- Be sure your registration is up to date and not due to expire
- If you do not have AAA, sign-up for service in case of problems on the road
- Make hotel reservations in advance if you can plan your travel each day – AAA books will note hotels that take pets (*usually for a fee*)

### Moving with Pets

- If by air, check on the airline's requirements regarding how many pets can fly, health certificates, cost, required pet carriers, need for reservations, etc.
- Make appropriate flight arrangements for your pet(s)
- Have each pet checked by the vet and make sure all shots are up-to-date and obtain a health certificate as airline may ask
- Request a copy of each pet's vet records for the new vet
- If traveling by car, make sure you have appropriate pet carriers, if needed, as well as food and water bowls, kitty litter, dog biscuits, dog/cat beds, leashes/harnesses, medications, etc.

### Address Changes You Should Make

- Mail *at least one week in advance*
- Bank Account(s)
- IRA, Mutual Funds, 401(k)
- Magazines *these may NOT be forward by the USPS*
- Friends, Family, Neighbors
- Email Service *if needed for billing purposes*
- Telephone/Cell phone/Smartphone service
- Cable/Internet *or terminate service if applicable*
- Insurance *auto, life, Home owners (depending on if selling or not), etc.*
- Utility Providers *for final billing after you move*
- Attorney
- CPA
- Prescriptions



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### New Insurance You May Need to Arrange

- Auto(s)
- Health
- Dental
- Vision
- Life
- Homeowner's or Renter's

### Items to Take with You

- Important personal papers and documents e.g., *passports, birth certificates, social security cards*
- Health insurance cards
- Credit cards
- ATM cards
- Cash or traveler's checks
- Checkbook(s)
- Jewelry
- Toiletries
- Medicines *prescription and OTC*
- Clothing for several days until movers arrive
- Smartphones and cellphones *Consider upgrading your service to allow free roaming, improved long distance coverage, texting, etc.*
- iPad and/or laptop
- Chargers for all electronics

### Pack an "Unpack Me First" Box

- Coffee maker, coffee, coffee grinder and filters
- Tea bags
- Coffee mugs/tea cups
- Toilet paper, napkins, paper towels
- Snacks
- Pet foods and medicines
- Leashes and water bowls
- Flashlight
- Bottled water
- LABEL THE BOX IN RED LETTERS



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### Cancel the Following at Your Old Home *(if applicable)*:

- Utilities as of the closing date
- Insurance (Home Owner's or Renters's) - can be done after closing and refunded
- Landscaping Service
- Pool and Spa Service
- Security Service
- Trash Pickup
- Auto-Deliveries e.g., *bottle water, water softener*
- Termite/Ant Services
- House cleaning service

### Planning Your House Hunting Trip

- Determine your dates and coordinate with your REALTOR
- Make airfare arrangements. *Be sure to check with the Relocation Company regarding requirements, if applicable*
- Make hotel arrangements *Again, check with the Relocation Company*
- Plan the homes you wish to see with your REALTOR
- Review all the MLS listings and familiarize yourself with the communities using blogs and websites e.g., *CarlsbadRealEstateNews.com*
- Pack your digital camera and video camera
- Take a note pad or your iPad/tablet
- Measuring tape
- Bring a checkbook just in case a check is needed
- Go with the attitude that you ARE going to buy a house!



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