

The background of the entire page is a photograph of the Mexican flag waving on a tall pole against a clear blue sky with some light clouds. Below the flag, a large, historic, multi-story building with many windows and green awnings is visible. A group of people is walking in the plaza in front of the building. The text "MEXICO MADE EASY" is written in a large, white, serif font, and "VIP ACTION PLAN" is written in a smaller, white, serif font below it.

# MEXICO MADE EASY

## VIP ACTION PLAN

[www.GlobalCitizenLife.org](http://www.GlobalCitizenLife.org)

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# Welcome and Instructions

## Welcome Message from the Summit Organizers

Welcome to the Fast Track to Mexico Summit – Mexico Made Easy! We are thrilled to have you as a VIP participant and are excited to help you embark on your journey toward a global lifestyle. This Action Plan Guide is designed to complement the insights and information you will receive during the summit, providing you with a personalized roadmap to achieve your international living goals.

## Brief Overview of How to Use the Guide

This guide is structured to help you systematically plan your transition to a global citizen lifestyle. Each section aligns with key topics covered during the summit, offering practical worksheets, checklists, and resources to tailor the information to your specific needs. You will need to do more research for your own specific needs and desired lifestyle.

1. **Personal Assessment:** Reflect on your goals, values, and current situation to set a strong foundation for your global lifestyle.
2. **Research and Planning:** Explore essential factors to consider when choosing a city or town to relocate to and compare your top choices.
3. **Legal and Financial Planning:** Gain insights into visas, residency, and financial strategies to support your move.
4. **Health and Safety:** Ensure you have a solid plan for accessing healthcare and staying safe abroad.
5. **Networking and Community:** Learn how to build a supportive network in Mexico.
6. **Business and Entrepreneurship:** Discover steps to establish and grow your business internationally.
7. **Ongoing Support and Resources:** Access a curated list of resources and maintain your connection with the Global Citizen Life community.

**8. Follow-Up and Accountability:** Set and track your goals with templates designed to keep you on track.

### **Instructions on Filling Out the Guide**

**1. Review Summit Sessions:** As you attend the summit sessions, take notes and highlight key points relevant to your situation.

**2. Complete Worksheets:** Use the provided worksheets and checklists to apply the information to your personal context. These are interactive and can be filled out digitally or printed for your convenience.

**3. Set Personal Goals:** Utilize the goal-setting templates to define clear, actionable steps towards your global lifestyle.

**4. Utilize Resources:** Refer to the resource lists for additional support and stay connected with the [Global Citizen Life community](#) for ongoing assistance.

We are here to support you every step of the way. If you have any questions or need additional assistance, please don't hesitate to reach out to our team.

Welcome to your journey of global living and thriving beyond borders!

Best regards,

The Global Citizen Life Team

# Personal Assessment

## Personal Goals and Values

### Personal Goals

1. What are your top three personal goals for moving to Mexico?

Goal 1: \_\_\_\_\_

Goal 2: \_\_\_\_\_

Goal 3: \_\_\_\_\_

### Core Values

2. List your core values and how they align with your desired lifestyle:

Core Value 1: \_\_\_\_\_

- How it aligns: \_\_\_\_\_

Core Value 2: \_\_\_\_\_

- How it aligns: \_\_\_\_\_

Core Value 3: \_\_\_\_\_

- How it aligns: \_\_\_\_\_

Core Value 4: \_\_\_\_\_

- How it aligns: \_\_\_\_\_

# Current Situation Analysis

## Current Living Situation

1. Describe your current living situation:

Residence: \_\_\_\_\_

Employment/Business: \_\_\_\_\_

Family and Social Ties: \_\_\_\_\_

Financial Status: \_\_\_\_\_

## Motivations for Relocation

2. What are your main motivations for considering moving to Mexico?

Motivation 1: \_\_\_\_\_

Motivation 2: \_\_\_\_\_

Motivation 3: \_\_\_\_\_

## Additional Considerations

3. Are there any additional considerations or concerns influencing your decision to move to Mexico?

Consideration 1: \_\_\_\_\_

Consideration 2: \_\_\_\_\_

Consideration 3: \_\_\_\_\_

**Summary**

Summarize how your current situation and motivations align with your goals and values for moving to Mexico. Take a truthful honest look at yourself and the lifestyle you desire. Think about hobbies, activities, weather, all the things you like and you don't like. Make of list of the things your want and the things you don't want. You want to make sure you are choosing the right reason for moving and then the right destination for you.



# Research and Planning

## Factors to Consider

It is imperative that you know the real numbers about your cost of living now and what you can afford abroad. We also need to consider your quality of life. When evaluating potential countries for relocation, consider the following factors:

### 1. Cost of Living:

- Housing: Rent or mortgage costs
- Utilities: Electricity, water, internet, etc.
- Groceries and Dining: Average monthly expenses
- Transportation: Public transit, car expenses
- Miscellaneous: Entertainment, clothing, etc.

### 2. Healthcare Quality and Accessibility:

- Availability of healthcare facilities
- Quality of medical services
- Health insurance options and costs
- Access to specialists and emergency care

### 3. Education System:

- Quality of primary, secondary, and higher education
- Availability of international schools
- Education costs and scholarships
- Language of instruction

#### **4. Quality of Life:**

- Safety and security
- Climate and environmental conditions
- Work-life balance
- Leisure activities and recreation

#### **5. Cultural and Social Environment:**

- Language and ease of communication
- Cultural norms and social integration
- Community and expat support networks
- Attitude towards foreigners and diversity

#### **Additional Notes:**

# Country Comparison

Use this worksheet to compare your top three cities/regions of interest based on the factors listed above.

**City/Region 1:** \_\_\_\_\_

## 1. Cost of Living:

Housing: \_\_\_\_\_

Utilities: \_\_\_\_\_

Groceries and Dining: \_\_\_\_\_

Transportation: \_\_\_\_\_

Miscellaneous: \_\_\_\_\_

## 2. Healthcare Quality and Accessibility:

Availability of healthcare facilities: \_\_\_\_\_

Quality of medical services: \_\_\_\_\_

Health insurance options and costs: \_\_\_\_\_

Access to specialists and emergency care: \_\_\_\_\_

## 3. Education System:

Quality of education: \_\_\_\_\_

Availability of international schools: \_\_\_\_\_

Education costs and scholarships: \_\_\_\_\_

Language of instruction: \_\_\_\_\_

**4. Quality of Life:**

Safety and security: \_\_\_\_\_

Climate and environmental conditions: \_\_\_\_\_

Work-life balance: \_\_\_\_\_

Leisure activities and recreation: \_\_\_\_\_

**5. Cultural and Social Environment:**

Language and ease of communication: \_\_\_\_\_

Cultural norms and social integration: \_\_\_\_\_

Community and expat support networks: \_\_\_\_\_

Attitude towards foreigners and diversity: \_\_\_\_\_

**City/Region 2:** \_\_\_\_\_

**1. Cost of Living:**

Housing: \_\_\_\_\_

Utilities: \_\_\_\_\_

Groceries and Dining: \_\_\_\_\_

Transportation: \_\_\_\_\_

Miscellaneous: \_\_\_\_\_

**2. Healthcare Quality and Accessibility:**

Availability of healthcare facilities: \_\_\_\_\_

Quality of medical services: \_\_\_\_\_

Health insurance options and costs: \_\_\_\_\_

Access to specialists and emergency care: \_\_\_\_\_

### **3. Education System:**

Quality of education: \_\_\_\_\_

Availability of international schools: \_\_\_\_\_

Education costs and scholarships: \_\_\_\_\_

Language of instruction: \_\_\_\_\_

### **4. Quality of Life:**

Safety and security: \_\_\_\_\_

Climate and environmental conditions: \_\_\_\_\_

Work-life balance: \_\_\_\_\_

Leisure activities and recreation: \_\_\_\_\_

### **5. Cultural and Social Environment:**

Language and ease of communication: \_\_\_\_\_

Cultural norms and social integration: \_\_\_\_\_

Community and expat support networks: \_\_\_\_\_

Attitude towards foreigners and diversity: \_\_\_\_\_

**City/Region 3:** \_\_\_\_\_

**1. Cost of Living:**

Housing: \_\_\_\_\_

Utilities: \_\_\_\_\_

Groceries and Dining: \_\_\_\_\_

Transportation: \_\_\_\_\_

Miscellaneous: \_\_\_\_\_

**2. Healthcare Quality and Accessibility:**

Availability of healthcare facilities: \_\_\_\_\_

Quality of medical services: \_\_\_\_\_

Health insurance options and costs: \_\_\_\_\_

Access to specialists and emergency care: \_\_\_\_\_

**3. Education System:**

Quality of education: \_\_\_\_\_

Availability of international schools: \_\_\_\_\_

Education costs and scholarships: \_\_\_\_\_

Language of instruction: \_\_\_\_\_

**4. Quality of Life:**

Safety and security: \_\_\_\_\_

Climate and environmental conditions: \_\_\_\_\_

Work-life balance: \_\_\_\_\_

Leisure activities and recreation: \_\_\_\_\_

#### 5. Cultural and Social Environment:

Language and ease of communication: \_\_\_\_\_

Cultural norms and social integration: \_\_\_\_\_

Community and expat support networks: \_\_\_\_\_

Attitude towards foreigners and diversity: \_\_\_\_\_

## Legal and Financial Planning

### Information Section: Visas, Residency, and Citizenship Options

#### Which Program Will Work Best for You?

When considering moving to a new country, it's crucial to determine which visa, residency, or citizenship program aligns best with your personal and professional goals. Here are some key questions to guide your decision-making process:

##### 1. Visa Options:

###### ○ Work Visa:

- Do you plan to seek employment in the new country?
- What are the specific requirements, costs, and processing times for obtaining a work visa?

###### ○ Investor Visa:

- Are you interested in investing in the country's economy to gain residency?
- What are the investment requirements, costs, and timelines for the investor visa?

## 2. Residency Options:

### ○ Temporary Residency:

- Does a temporary residency program suit your initial relocation plans?
- What are the costs, required documentation, and processing times for temporary residency?

### ○ Permanent Residency:

- Are you aiming for long-term or permanent stay?
- What are the eligibility criteria, costs, and timeframes for obtaining permanent residency?

## 3. Citizenship Options:

### ○ Naturalization:

- Are you interested in eventually becoming a citizen of the new country?
- What are the requirements, costs, and timelines for naturalization?

### ○ Citizenship by Investment:

- Would you consider obtaining citizenship through financial investment?
- What types of investments are required, and what are the associated costs and processing times?

Use these questions to evaluate and compare the different options available in Mexico.



# Financial Planning

## Budget Planning for Relocation

### 1. Pre-Move Expenses:

Visa and residency application fees: \$\_\_\_\_\_

Legal assistance: \$\_\_\_\_\_

Moving costs (shipping, travel): \$\_\_\_\_\_

Initial housing (deposit, rent): \$\_\_\_\_\_

Miscellaneous expenses: \$\_\_\_\_\_

**Total Pre-Move Expenses: \$\_\_\_\_\_**

### 2. Post-Move Expenses (Monthly):

Housing: \$\_\_\_\_\_

Utilities: \$\_\_\_\_\_

Groceries and dining: \$\_\_\_\_\_

Transportation: \$\_\_\_\_\_

Healthcare: \$\_\_\_\_\_

Education (if applicable): \$\_\_\_\_\_

Insurance: \$\_\_\_\_\_

Miscellaneous: \$\_\_\_\_\_

**Total Monthly Expenses: \$\_\_\_\_\_**

### 3. Annual Expenses:

Tax obligations: \$ \_\_\_\_\_

Travel back to home country: \$ \_\_\_\_\_

Emergency fund: \$ \_\_\_\_\_

**Total Annual Expenses:** \$ \_\_\_\_\_

## Tax Implications and Planning Strategies

### 1. Understand Your Tax Obligations:

Home country tax requirements: \_\_\_\_\_

Mexico tax requirements: \_\_\_\_\_

Double taxation agreements: \_\_\_\_\_

### 2. Tax Planning Strategies:

Utilize tax advisors specializing in international tax law.

Explore tax incentives offered by Mexico.

Maintain accurate financial records and documentation.

# Legal Checklist

## Steps to Obtain Necessary Visas and Residency Permits

### 1. Research Requirements:

Determine the type of visa/residency needed: \_\_\_\_\_

Research the specific requirements for the chosen: \_\_\_\_\_

### 2. Gather Documentation:

Valid passport

Completed application forms

Proof of funds

Health insurance coverage

Police clearance certificate

Additional documents (e.g., employment contract): \_\_\_\_\_

### 3. Submit Application:

Application submission method (online/in-person): \_\_\_\_\_

Application fee payment: \_\_\_\_\_

Expected processing time: \_\_\_\_\_

### 4. Follow-Up:

Track application status: \_\_\_\_\_

Respond to any additional requests for information: \_\_\_\_\_

### 5. Post-Approval:

Obtain the visa/residency permit: \_\_\_\_\_

Register with local authorities (if required): \_\_\_\_\_

Understand the terms and conditions of your visa/residency: \_\_\_\_\_

# Health and Safety

## **Information Section: Accessing Healthcare Abroad**

Accessing healthcare in a new country can vary significantly from your home country. Here are some essential aspects to consider:

### **1. Healthcare Systems:**

- Understand whether Mexico has a public healthcare system, private healthcare system, or a mix of both.
- Determine the quality and accessibility of healthcare services in general and your selected region.

### **2. Health Insurance:**

- Explore options for obtaining health insurance as an expatriate.
- Determine whether you need international health insurance or if you can participate in the local healthcare system.
- Assess the costs and coverage of different health insurance plans.

### **3. Finding Healthcare Providers:**

- Identify reputable hospitals, clinics, and healthcare providers in your new location.
- Look for English-speaking doctors or those who speak your native language if needed.

### **4. Medication and Prescriptions:**

- Check the availability of your regular medications and understand the process for obtaining prescriptions.
- Consider bringing an initial supply of essential medications and a copy of your prescriptions.

### **5. Emergency Services:**

- Learn the local emergency numbers and procedures for accessing emergency medical services.
- Familiarize yourself with the locations of nearby emergency facilities.

# Health and Safety Plan

## List of Local Healthcare Facilities

### 1. Hospitals:

Hospital Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

Hospital Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

### 2. Clinics:

Clinic Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

Clinic Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

### 3. Pharmacies:

Pharmacy Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

Pharmacy Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

### Emergency Contact Information

#### 1. Local Emergency Numbers:

Police: \_\_\_\_\_

Fire Department: \_\_\_\_\_

Medical Emergency: \_\_\_\_\_

#### 2. Nearest Emergency Facilities:

Facility Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Services Offered: \_\_\_\_\_

### 3. Personal Emergency Contacts:

Contact Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

### Personal Health Insurance Details

#### 1. Insurance Provider:

Provider Name: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Email: \_\_\_\_\_

#### 2. Coverage Details:

Coverage Type: \_\_\_\_\_

Coverage Amount: \_\_\_\_\_

Exclusions: \_\_\_\_\_

**3. Local Insurance Options:**

Provider Name: \_\_\_\_\_

Policy Details: \_\_\_\_\_

Costs: \_\_\_\_\_

Provider Name: \_\_\_\_\_

Policy Details: \_\_\_\_\_

Costs: \_\_\_\_\_

**Additional Emergency Information:**



# Networking and Community

## **Tips: Building Your Network**

### Strategies Discussed During Summit Sessions

#### **1. Leverage Existing Networks:**

- Reach out to friends, family, or colleagues who have experience living abroad.
- Use social media platforms to connect with expatriate communities.

#### **2. Join Expat Groups and Clubs:**

- Look for local expat groups on platforms like Meetup, Internations, or Facebook.
- Attend events and gatherings organized by these groups to meet like-minded individuals.

#### **3. Engage in Local Activities:**

- Participate in local cultural events, festivals, and community activities.
- Enroll in language classes or hobby groups to meet locals and other expats.

#### **4. Professional Networking:**

- Attend industry conferences, seminars, and workshops.
- Join professional associations or chambers of commerce related to your field.

#### **5. Volunteer:**

- Get involved with local NGOs, charities, or community service projects.
- Volunteering can provide meaningful connections and a deeper understanding of the local culture.

## 6. Online Communities:

- Engage with online forums and communities dedicated to expat living. Some Facebook groups can be good and [www.meetup.com](http://www.meetup.com) has many activities in cities around the world
- Websites like Expat.com, Reddit (r/expats), and other forums can offer advice and support.

## Community and Networking Plan

List of Potential Networking Events and Communities

### 1. Local Expat Groups and Clubs:

Group/Club Name: \_\_\_\_\_

- Meeting Times: \_\_\_\_\_

- Contact Information: \_\_\_\_\_

- Upcoming Events: \_\_\_\_\_

Group/Club Name: \_\_\_\_\_

- Meeting Times: \_\_\_\_\_

- Contact Information: \_\_\_\_\_

- Upcoming Events: \_\_\_\_\_

### 2. Cultural and Community Activities:

Activity/Event Name: \_\_\_\_\_

- Date and Time: \_\_\_\_\_

- Location: \_\_\_\_\_

- Contact Information: \_\_\_\_\_

Activity/Event Name: \_\_\_\_\_

- Date and Time: \_\_\_\_\_

- Location: \_\_\_\_\_

- Contact Information: \_\_\_\_\_

### **3. Professional Networking Opportunities:**

Event/Association Name: \_\_\_\_\_

- Date and Time: \_\_\_\_\_

- Location: \_\_\_\_\_

- Contact Information: \_\_\_\_\_

Event/Association Name: \_\_\_\_\_

- Date and Time: \_\_\_\_\_

- Location: \_\_\_\_\_

- Contact Information: \_\_\_\_\_

## **Steps to Integrate into Local Expat Communities**

### **1. Research and Join Groups:**

- Identify and join local expat groups and online communities.
- Introduce yourself and participate actively in discussions and events.

### **2. Attend Events Regularly:**

- Mark your calendar with upcoming events and make a commitment to attend regularly.
- Engage with attendees and exchange contact information.

### **3. Build Relationships:**

- Follow up with new contacts and arrange one-on-one meetups.
- Be open and approachable, and show genuine interest in others.

### **4. Contribute to the Community:**

- Offer your skills and expertise to help others in the community.
- Volunteer to organize events or provide support to new members.

### **5. Stay Connected:**

- Keep in touch with your network through social media, messaging apps, and regular meetups.
- Share your experiences and offer support to others navigating their new lives abroad.

## **Business and Entrepreneurship**

### **1. Choosing the Right Business Structure:**

- Understand the different types of business structures available (e.g., sole proprietorship, partnership, corporation, LLC).
- Determine the best structure for your business based on liability, taxation, and operational flexibility.

### **2. Market Research:**

- Conduct thorough research on the local market, including customer needs, competitors, and market trends.
- Identify your target audience and understand their preferences and purchasing behaviors.

### **3. Legal Requirements:**

- Learn about the legal requirements for setting up a business in Mexico or other countries.
- Obtain necessary permits and licenses.
- Understand the taxation system and compliance requirements.

### **4. Funding and Financial Planning:**

- Explore funding options such as local investors, loans, or grants.
- Develop a detailed financial plan, including startup costs, operational expenses, and projected revenues.

### **5. Cultural Considerations:**

- Adapt your business practices to align with local cultural norms and business etiquette.
- Build relationships with local partners and suppliers.

### **6. Operational Setup:**

- Find a suitable location for your business.
- Hire local employees and understand labor laws and regulations.
- Set up necessary infrastructure, including technology, equipment, and supply chains.

# Business Plan Outline

## Business Idea and Market Research

### 1. Business Idea:

- Describe your business idea: \_\_\_\_\_
- What products or services will you offer? \_\_\_\_\_

### 2. Market Research:

- Target Audience:
  - Who are your potential customers? \_\_\_\_\_
  - What are their needs and preferences? \_\_\_\_\_
- Competitor Analysis:
  - Who are your main competitors? \_\_\_\_\_
  - What are their strengths and weaknesses? \_\_\_\_\_
- Market Trends:
  - What are the current trends in the market? \_\_\_\_\_
  - How can your business leverage these trends? \_\_\_\_\_

## Steps to Establish Your Business in a New Country

### 1. Business Structure:

- Decide on the business structure: \_\_\_\_\_
- Register your business name: \_\_\_\_\_

## **2. Legal Requirements:**

- Obtain necessary permits and licenses: \_\_\_\_\_
- Understand local tax obligations and register for taxes: \_\_\_\_\_

## **3. Funding and Financial Planning:**

- Identify funding sources: \_\_\_\_\_
- Develop a financial plan with startup costs and operational expenses: \_\_\_\_\_
- Project your revenue streams and break-even point: \_\_\_\_\_

## **4. Operational Setup:**

- Find a suitable location: \_\_\_\_\_
- Set up infrastructure (technology, equipment, supply chains): \_\_\_\_\_
- Hire local employees and ensure compliance with labor laws: \_\_\_\_\_

## **Local Regulations and Compliance Checklist**

### **1. Registration and Licensing:**

- Business registration: \_\_\_\_\_
- Industry-specific licenses: \_\_\_\_\_

### **2. Tax Compliance:**

- Register for local taxes: \_\_\_\_\_
- Understand VAT/GST requirements: \_\_\_\_\_
- Set up accounting and bookkeeping systems: \_\_\_\_\_

### **3. Employment and Labor Laws:**

- Understand local employment contracts: \_\_\_\_\_
- Comply with minimum wage laws: \_\_\_\_\_
- Ensure workplace safety and labor standards: \_\_\_\_\_

### **4. Intellectual Property:**

- Register trademarks, patents, and copyrights: \_\_\_\_\_

### **5. Ongoing Compliance:**

- Schedule regular compliance audits: \_\_\_\_\_
- Stay updated on changes in local regulations: \_\_\_\_\_

Additional Notes:



# Personal Resource Directory

## Personalized List of Contacts and Resources

Key Contacts:

### 1. Local Expat Community Leader:\*\*

- Name: \_\_\_\_\_

- Phone: \_\_\_\_\_

- Email: \_\_\_\_\_

- Notes: \_\_\_\_\_

### 2. Legal Advisor:

- Name: \_\_\_\_\_

- Firm: \_\_\_\_\_

- Phone: \_\_\_\_\_

- Email: \_\_\_\_\_

- Notes: \_\_\_\_\_

### 3. Financial Advisor:

- Name: \_\_\_\_\_

- Firm: \_\_\_\_\_

- Phone: \_\_\_\_\_

- Email: \_\_\_\_\_

- Notes: \_\_\_\_\_

#### 4. Healthcare Provider:

- Name: \_\_\_\_\_
- Hospital/Clinic: \_\_\_\_\_
- Phone: \_\_\_\_\_
- Email: \_\_\_\_\_
- Notes: \_\_\_\_\_

#### 5. Language Tutor:

- Name: \_\_\_\_\_
- Phone: \_\_\_\_\_
- Email: \_\_\_\_\_
- Notes: \_\_\_\_\_

#### Useful Websites and Online Resources:

1. Website: \_\_\_\_\_
  - URL: \_\_\_\_\_
  - Description: \_\_\_\_\_
  
2. Website: \_\_\_\_\_
  - URL: \_\_\_\_\_
  - Description: \_\_\_\_\_
  
3. Website: \_\_\_\_\_
  - URL: \_\_\_\_\_
  - Description: \_\_\_\_\_

## **Organizations and Support Networks:**

1. Organization: \_\_\_\_\_

- Contact Person: \_\_\_\_\_

- Phone: \_\_\_\_\_

- Email: \_\_\_\_\_

- Notes: \_\_\_\_\_

2. Organization: \_\_\_\_\_

- Contact Person: \_\_\_\_\_

- Phone: \_\_\_\_\_

- Email: \_\_\_\_\_

- Notes: \_\_\_\_\_

3. Organization: \_\_\_\_\_

- Contact Person: \_\_\_\_\_

- Phone: \_\_\_\_\_

- Email: \_\_\_\_\_

- Notes: \_\_\_\_\_

# Follow-Up and Accountability

## Goal Setting and Tracking Templates

### Personal Goals:

#### 1. Short-Term Goals (Next 3-6 Months):

- Goal 1: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Goal 2: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

#### 2. Mid-Term Goals (6-12 Months):

- Goal 1: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Goal 2: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

### 3. Long-Term Goals (1-3 Years):

- Goal 1: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Goal 2: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

### Professional Goals:

#### 1. Short-Term Goals (Next 3-6 Months):

- Goal 1: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Goal 2: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

## 2. Mid-Term Goals (6-12 Months):

- Goal 1: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Goal 2: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_

## 3. Long-Term Goals (1-3 Years):

- Goal 1: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Goal 2: \_\_\_\_\_
- Action Steps: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

## Timeline for Action

Create a Personalized Timeline for Your Relocation and Integration Steps

### 1. Pre-Relocation:

- Research and choose destination: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Obtain necessary visas and permits: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Secure housing and transportation: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_
  
- Plan financial and tax strategies: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

### 2. Relocation:

- Move and settle into new home: \_\_\_\_\_
- Deadline: \_\_\_\_\_
- Progress: \_\_\_\_\_

- Set up utilities and services: \_\_\_\_\_

- Deadline: \_\_\_\_\_

- Progress: \_\_\_\_\_

- Register with local authorities: \_\_\_\_\_

- Deadline: \_\_\_\_\_

- Progress: \_\_\_\_\_

### 3. Integration:

- Join local and expat communities: \_\_\_\_\_

- Deadline: \_\_\_\_\_

- Progress: \_\_\_\_\_

- Enroll in language and cultural classes: \_\_\_\_\_

- Deadline: \_\_\_\_\_

- Progress: \_\_\_\_\_

- Establish professional and business connections: \_\_\_\_\_

- Deadline: \_\_\_\_\_

- Progress: \_\_\_\_\_

### 4. Ongoing:

- Regularly review and adjust goals: \_\_\_\_\_

- Frequency: \_\_\_\_\_

- Progress: \_\_\_\_\_



- Maintain health and safety plans: \_\_\_\_\_

- Frequency: \_\_\_\_\_

- Progress: \_\_\_\_\_

- Stay connected with Global Citizen Life community: \_\_\_\_\_

- Frequency: \_\_\_\_\_

- Progress: \_\_\_\_\_

**Additional Notes:**

## Moving Pets

To bring dogs and cats into Mexico via an airline please check your airline's website – rules vary quite a bit. Pets are generally not permitted to fly, other than in the cabin (smaller dogs and cats), during the hotter summer months. There are also embargoes on flying pets on many airlines during the Christmas season — actually for weeks leading up to it. The theory, as far as I can tell, is that the cages take up too much room during a busy season with lots of extra suitcases.

When bringing a dog or cat by car, health certificates are no longer required.

Please read here regarding dogs, cats, birds, ferrets, etc. <https://www.aphis.usda.gov/aphis/pet-travel/by-country/pettravel-mexico>

Please have a collar and tag on your dog.

The tag should include pet's name and email address or a phone number. If the phone number is not a Mexican number, please include access code for when calling from Mexico.

## Healthcare Information

**IMSS (Instituto Mexicano Seguro Social)** is available to Temporary and Permanent Residents. Renewals are annual and fees may be as high as 20,500 pesos, depending on one's age. Those with pre-existing conditions, which may be as common as high blood pressure or high cholesterol, are normally denied coverage at the time of application or possibly not until when one has a serious health issue. In some locations, when joining IMSS, applicants pay the membership fee and then they are required to take a medical. If they are denied coverage at this point, the annual fee is not refunded.

The first year's coverage with IMSS is practically nil; the second year's coverage is greater but full coverage is not until the third year. This is generally the health insurance one has when employed.

Anyone who has a CURP, meaning all Temporary and Permanent Residents, has healthcare. It is called the **Institute of Health for Welfare (INSABI)**.

There is no fee. There is no sign-up. One needs a CURP page printout (not a MX state driver's license or something showing your CURP number), recent utility bill in anyone's name and a Temporary or Permanent Resident visa. A citizen would normally provide an INE / IFE card. There is no membership; there is no age limit. You simply attend to what was a Seguro Popular facility for health care with the documents I noted.

You may print out your [CURP](#) anytime.

Public healthcare at INSABI and IMSS hospitals varies widely. One program is not necessarily better than the other. INSABI in Mexico City is often very good and in some places much less so. In some cities such as San Miguel de Allende, INSABI has a large modern clinic and a hospital whereas IMSS has no hospital and a dated clinic.

Doctors who work with these programs often have a private practice, so to suggest the doctors are of lesser calibre is not true. Doctors who work in private care or at public government facilities do so for low-cost housing assistance, pensions and in some cases to provide care to those who may not otherwise afford their expertise. For many expats, the best option is INSABI which has no fee, supplemented with private insurance.

For private insurance we recommend [Nomad Insurance](#). You can design a plan that suits your needs and lifestyle.

Dear Fast Track to Mexico Summit VIP Participant,

Congratulations on taking the first step towards embracing a global lifestyle! This Action Plan Guide is designed to support you as you navigate the exciting journey of relocating and integrating into Mexico. By setting clear goals, planning your actions, and utilizing the resources provided, you are well on your way to achieving your dream of becoming a global citizen.

Remember, you are not alone in this journey. The Global Citizen Life community is here to provide ongoing support, resources, and connections to help you thrive. Stay connected with us through our website, social media channels, and upcoming events.

We wish you all the best in your new adventures and look forward to celebrating your successes with you.

Safe travels and warm regards,

The Global Citizen Life Team