

Comprehensive Relocation Checklist: Canada to Mexico

This checklist provides a detailed, actionable guide for every step of your relocation journey from Canada to Mexico. It is designed to ensure you don't miss any critical tasks, from initial planning to settling into your new life.

Phase 1: Initial Planning & Research (3-6 Months Before Move)

- **Goals & Priorities:**

- ☐ Define your reasons for moving to Mexico (lifestyle, cost of living, climate, etc.).
- ☐ Research potential cities/regions in Mexico that align with your lifestyle and budget.
- ☐ Discuss relocation plans with family members and ensure everyone is on board.

- **Financial Planning:**

- ☐ Create a detailed budget for pre-move expenses, moving costs, and initial living expenses in Mexico.
- ☐ Research cost of living comparisons between your current Canadian location and your target Mexican city.
- ☐ Consult with a cross-border financial advisor to understand implications for investments, pensions, and savings.
- ☐ Research options for banking in Mexico and transferring funds (e.g., Wise, OFX).
- ☐ Ensure you have an emergency fund for unexpected expenses.

- **Healthcare Considerations:**

- ☐ Research public (IMSS) and private healthcare options in Mexico.
- ☐ Investigate international or local health insurance plans suitable for expats.
- ☐ Obtain copies of your medical records and prescriptions.
- ☐ Discuss ongoing medical needs with your Canadian doctor.

- **Education (if applicable):**

- ☐ Research international schools, bilingual schools, or local public schools in your target area.
- ☐ Understand enrollment requirements and timelines.

- **Cultural Adaptation & Language:**

- [] Begin learning basic Spanish phrases and common cultural norms.
 - [] Research Mexican customs, traditions, and social etiquette.
 - [] Connect with online expat communities for insights into daily life.
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Phase 2: Residency & Immigration (2-4 Months Before Move)

- **Visa Type Selection:**

- [] Determine the most appropriate Mexican visa type for your situation (Temporary Resident, Permanent Resident).
- [] Understand the financial solvency requirements for your chosen visa category.

- **Application Preparation (at Mexican Consulate in Canada):**

- [] Gather all required documents (passport, birth certificate, marriage certificate, financial statements, etc.).
- [] Ensure all documents are translated into Spanish by a certified translator if required.
- [] Schedule your appointment at the nearest Mexican Consulate in Canada.
- [] Prepare for your consulate interview.
- [] Pay all application fees.

- **Post-Arrival in Mexico (at INM):**

- [] Understand the process for exchanging your visa stamp for a physical residency card at the National Migration Institute (INM) office in Mexico.
- [] Be prepared for potential additional documentation or interviews at INM.
- [] Obtain your CURP (Clave Única de Registro de Población) if not issued with your residency card.

- **Professional Assistance:**

- [] Consider consulting with a reputable Mexican immigration lawyer or facilitator.
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Phase 3: Finding Your Home in Mexico (1-3 Months Before Move / Upon Arrival)

- **Renting vs. Buying Decision:**

- ☐ Decide whether to rent initially or purchase property based on your long-term plans.

- **Property Search:**

- ☐ Research neighborhoods and property types in your chosen Mexican city.
- ☐ Utilize online real estate platforms (e.g., Vivanuncios, Inmuebles24, local real estate agent websites).
- ☐ If buying, understand the legalities of foreign ownership (Fideicomiso) and avoid Ejido land.
- ☐ If renting, understand typical lease terms, security deposits, and contract requirements.

- **Real Estate Professional:**

- ☐ Find a reputable, bilingual real estate agent specializing in expat transactions.
- ☐ If buying, engage a qualified real estate lawyer.

- **Property Viewings:**

- ☐ Schedule virtual or in-person property viewings.
- ☐ Consider a short-term rental upon arrival to explore areas before committing to a long-term lease or purchase.

Phase 4: Starting a Business in Mexico (If Applicable)

- **Business Planning:**

- ☐ Develop a comprehensive business plan for your venture in Mexico.
- ☐ Research the Mexican market and identify your target audience.

- **Legal Structure:**

- ☐ Consult with a Mexican lawyer to determine the appropriate business structure (e.g., Sole Proprietorship, S. de R.L. de C.V., S.A. de C.V.).

- **Registration & Compliance:**

- ☐ Register your business with the Public Registry of Commerce and other relevant government entities.
- ☐ Obtain your RFC (Registro Federal de Contribuyentes) for tax purposes.
- ☐ Understand and comply with Mexican labor laws if hiring employees.

- **Taxation:**

- ☐ Engage a bilingual Mexican accountant to manage your business taxation and ensure compliance.
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Phase 5: Logistics of the Move (1 Month Before Move - Arrival)

- **Moving Belongings:**

- ☐ Inventory all items you plan to move.
- ☐ Decide whether to ship, sell, or donate items.
- ☐ If shipping, obtain a Menaje de Casa certificate from a Mexican Consulate in Canada.
- ☐ Hire a reputable international moving company or freight forwarder.
- ☐ Engage a Mexican customs broker for import clearance.
- ☐ Pack belongings securely and label boxes clearly.

- **Pet Relocation (if applicable):**

- ☐ Research specific requirements for importing pets to Mexico (vaccinations, health certificates).
- ☐ Consult with your veterinarian for necessary paperwork and health checks.
- ☐ Arrange for pet travel (airline, pet transport service).

- **Banking & Financial Transfers:**

- ☐ Notify your Canadian bank of your move and travel plans.
- ☐ Set up online banking access for your Canadian accounts.
- ☐ Research and choose an international money transfer service.
- ☐ Plan for initial cash needs upon arrival in Mexico.

- **Driving to Mexico (if applicable):**

- ☐ Obtain a Temporary Import Permit (TIP) for your vehicle.
- ☐ Purchase Mexican auto insurance (mandatory).
- ☐ Prepare your vehicle for the journey (maintenance, emergency kit).
- ☐ Plan your route and research border crossing procedures.

- **Utilities & Services (upon arrival):**

- ☐ Arrange for connection/transfer of electricity (CFE), water, gas, and internet at your new home.
- ☐ Purchase a local Mexican SIM card for your mobile phone.

- **Mail Forwarding:**

- ☐ Set up mail forwarding from your Canadian address.
 - ☐ Update your address with important institutions (banks, government, subscriptions).
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Phase 6: Life in Mexico - Adapting & Thriving (Upon Arrival & Ongoing)

- **Daily Life & Cultural Immersion:**

- ☐ Continue learning Spanish through classes, apps, or language exchange.
- ☐ Engage with local customs and traditions.
- ☐ Explore local markets, restaurants, and cultural sites.

- **Healthcare:**

- ☐ Register with IMSS if opting for public healthcare, or finalize private insurance arrangements.
- ☐ Find a local doctor and dentist.
- ☐ Locate nearby pharmacies.

- **Transportation:**

- ☐ Familiarize yourself with local public transport options.
- ☐ If driving, obtain a Mexican driver's license.

- **Community & Social Life:**

- ☐ Join local expat groups and attend social events.
- ☐ Seek opportunities to integrate with local Mexican communities.
- ☐ Consider volunteering or joining clubs based on your interests.

- **Safety & Security:**

- ☐ Understand local safety guidelines and be aware of your surroundings.
- ☐ Keep emergency contacts handy (911, Canadian Embassy/Consulate).
- ☐ Secure your home.

- **Continuing Education & Hobbies:**

- ☐ Explore local classes (cooking, dance, art) or sports activities.
 - ☐ Pursue new hobbies or continue existing ones in your new environment.
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Phase 7: Essential Resources & Contacts (Ongoing)

- **Government Contacts:**

- ☐ Keep contact information for the Canadian Embassy and Consulates in Mexico readily available.
- ☐ Register with the Registration of Canadians Abroad service.

- **Professional Network:**

- ☐ Maintain contact with your Mexican immigration lawyer/facilitator.
- ☐ Stay in touch with your financial advisor and accountant.
- ☐ Keep contact details for your healthcare providers and insurance broker.

- **Online & Local Communities:**

- ☐ Actively participate in relevant online expat forums and social media groups.
 - ☐ Engage with local community groups and events.
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This checklist is a living document. As you progress through your relocation, mark off completed tasks and add any new items that arise. Your journey to thriving in Mexico is unique, and this guide is here to support you every step of the way.