

# REPATRIATION CHECKLIST MOVING COUNTRIES

Preparing for departure to another country can be stressful.  
This checklist provides a step-by-step guide for expats moving from Switzerland to another country.

Written by  
**David Rosbotham**



## Plus Four Months Before

- ☐ **Car :** Exit lease or arrange for sale of vehicle.  
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- ☐ **Animals :** Deregister pets and cancel any pet insurances. Research required vaccinations for travel to new country.  
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- ☐ **Rental Lease :** Notify landlord, terminate lease, and arrange for inspections and security deposit refund.  
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- ☐ **Utilities :** Cancel or transfer utility services and settle outstanding bills.  
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- ☐ **School/Childcare :** Inform schools or childcare providers and transfer records or settle fees.  
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- ☐ **Membership Subscriptions :** Cancel or transfer memberships and subscriptions.  
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- ☐ **Language Skills :** Consider language courses or resources for integration into new environment.



## Two to Three Months Before

- ☐ **Legal Documents :** Gather important legal documents and ensure they are up to date.

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- ☐ **Pensions and Investments :** Plan the transfer or withdrawal of pensions and investments to avoid tax penalties or surrender fees.

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- ☐ **Health Records :** Obtain medical records and prescriptions and research healthcare options in new country.

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- ☐ **Social Security :** Inform relevant authorities and understand implications for benefits.

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- ☐ **Cultural Adjustment :** Research cultural differences and prepare for adaptation.



## Last Month Before Departure

- ☐ **Vehicle Registration :** Research registration requirements in new country or arrange for sale of vehicle.  
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- ☐ **Bank Accounts :** Close or transfer bank accounts and settle any outstanding balances.  
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- ☐ **Health Insurance :** Cancel Swiss health insurance and research insurance policies in new country, especially if private care is desired.  
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- ☐ **Standing Orders :** Review and cancel any standing orders, including QR bills for the internet, mobile, and other house insurance policies.  
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- ☐ **Tax Obligations :** File final tax returns in Switzerland and understand tax implications in new country.  
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- ☐ **Mail Forwarding :** Set up mail forwarding service or provide forwarding address.





# Repatriation

Transitioning from a country known for its high standard of living and robust financial infrastructure presents unique challenges that require careful consideration.

Financial planning facilitates a smooth transition by addressing the intricacies of tax implications associated with repatriation. Understanding the tax laws and regulations of both Switzerland and the destination country is crucial to minimise tax liabilities and ensure compliance.

Repatriating often involves transferring assets, such as pension funds, investments, and real estate holdings. Financial planning ensures that these assets are efficiently managed and optimised for the new financial landscape, taking into account currency exchange rates, investment opportunities, and potential tax consequences.

## *Personalised Advice*

We recognise that one-size-fits-all solutions often fall short during significant life transitions such as repatriation. Our personalised approach means you receive guidance that is specifically designed to address your needs, whether it's optimising tax efficiency, managing asset transfers, or adapting to a new financial environment. With our expertise and dedicated support, you can confidently navigate the complexities of repatriation and make informed decisions that align with your long-term financial objectives.

Visit us online to book a free consultation



[www.rosbothamfinance.com](http://www.rosbothamfinance.com)



**David Rosbotham DipPFS**  
Qualified Financial Planner

# ABOUT US

## *Rosbotham Finance*

As a reputable financial planning firm based in Switzerland, Rosbotham Finance take pride in offering comprehensive services to expatriates from across the globe. At our firm, we specialise in addressing the unique financial needs of our diverse clientele, with a particular focus on retirement planning, tax efficiency, investments, pension advice, inheritance tax planning, and overall financial well-being.



## *David Rosbotham*

As an experienced cross border adviser I am dedicated to providing personalised guidance and strategic solutions tailored to each client's specific circumstances and long-term goals. .



[david@rosbothamfinance.com](mailto:david@rosbothamfinance.com)



[www.rosbothamfinance.com](http://www.rosbothamfinance.com)