



RELOCATION.

THE GUIDE.

BY THE CONCIERGE HUB

Why relocation, and why now.

The world is moving. Not metaphorically, literally. Geopolitical instability, shifting tax regimes, changing residency laws and a growing appetite among the ultra-wealthy to diversify where they live, work and hold assets has created one of the most significant opportunities in luxury concierge in years.

High-net-worth individuals and families are relocating at a rate not seen in decades. Some are moving for security. Some for tax efficiency. Some for quality of life, education, or access to specific markets. And almost all of them need someone to manage the complexity that relocation creates, someone who understands both the logistical and the human dimensions of the process.

Relocation concierge is not a niche add-on. It is a full service category with real income potential, long engagement periods, and the kind of client relationship that generates referrals for years. A family that trusts you to move their life from one country to another will not easily find someone else to do it.

This manual covers everything. From the first client conversation to the last box unpacked. From pricing models and contracts to school searches, tax advisors, pet imports and the cultural briefings that make a new country feel like home. It is written from active practice, not theory. Use it, adapt it, and add to it as you build your own experience in this space.

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The Relocation Opportunity

Why the moment is now, and who is moving.

We are living through one of the most significant periods of global wealth migration in modern history. Geopolitical instability across multiple regions, sweeping changes to tax laws in traditionally stable countries, and a generation of ultra-wealthy individuals who are genuinely global in how they think about where to live, have created a demand for relocation support that far exceeds the supply of people who know how to provide it.

WHO IS RELOCATING RIGHT NOW

● High-net-worth families seeking political stability

Families from regions experiencing political instability or policy uncertainty are actively looking for stable jurisdictions with strong legal frameworks, good international schools and access to global markets. Portugal, Switzerland, the UAE, Singapore and the UK remain top destinations, though each has changed its programmes significantly in recent years.

● Tax-driven relocations

Changes to non-dom status in the UK, wealth taxes in several European countries, and new global minimum tax agreements have accelerated relocations among those with significant assets. These clients move with urgency and need comprehensive support across legal, financial and lifestyle dimensions simultaneously.

● Lifestyle and quality of life migrations

Post-pandemic, a significant segment of HNWI clients has reassessed where they want to live. Warmer climates, lower cost of living relative to income, proximity to nature, and access to excellent private healthcare are driving moves to Spain, Italy, Greece, the UAE, Costa Rica and beyond.

● Business-driven relocations

Entrepreneurs and fund managers moving their business base for regulatory, tax or market access reasons. These clients often move first and bring their families later, or maintain multiple residences simultaneously. Each arrangement creates a different scope of support.

● Ultra-wealthy multi-residency clients

The most complex and highest-value category. Clients who are not relocating in the traditional sense but establishing a new primary or secondary residence while maintaining others. Managing this complexity across multiple countries, legal systems and household setups is where a skilled relocation concierge adds the most value.

LUCIA'S INSIGHT

- *The relocation market is not a trend. It is a structural shift driven by lasting geopolitical and economic changes. The concierges who build this expertise now will have a significant advantage for years.*
- *Most clients who are relocating do not know what they do not know. Your first job is to help them understand the full scope of what needs to happen. That conversation alone demonstrates your value.*
- *Never advise on tax or legal matters directly. Your role is to coordinate the right specialists, not to replace them.*

SECTION 02

Your Role as Relocation Concierge

What you do, what you do not do, and how to position yourself.

Relocation concierge is a coordination and lifestyle management role. You are the person who holds the full picture of a client's move, manages the timeline, sources and briefs the specialists, and makes sure nothing falls through the cracks. You are not a lawyer, not a tax advisor, not a property agent and not an immigration consultant. But you know exactly when each of those people is needed and who the right ones are.

WHAT YOU DO

- **Scope and project manage the entire relocation**
From first briefing to settled-in client. You hold the timeline, track every moving part, and ensure all specialists are briefed, coordinated and delivering on time.
- **Source and vet all external specialists**
Immigration lawyers, tax advisors, property finders, relocation agents, school consultants, healthcare providers, household staff recruiters. You build and maintain the network. The client deals with one person: you.
- **Manage the property search and setup process**
Coordinating property viewings, liaising with agents, supporting the negotiation process, and overseeing the setup of the new home to the client's standard.
- **Handle all lifestyle logistics**
School applications, healthcare registration, club memberships, vehicle arrangements, domestic staff sourcing, utility setup and the hundred other details that make a new country liveable.
- **Provide cultural and practical orientation**
Briefing the client and their family on how things work in the new country. Local customs, practical systems, what to expect in day-to-day life. This is often underestimated and deeply appreciated.
- **Be the single point of contact throughout**
The client should not have to manage multiple relationships during a relocation. That is your job. You absorb the complexity and present the client with clarity, options and decisions.

WHAT YOU DO NOT DO

- **Provide legal, tax or immigration advice**
You refer to qualified specialists. You brief them, coordinate them and follow up on their work. You never advise directly on matters requiring professional qualifications.

- **Act as a property agent**

You can coordinate the property search process, but unless you hold the relevant licence in the relevant jurisdiction, you do not represent either party in the transaction.

- **Make decisions on the client's behalf without authorisation**

Relocation involves significant financial and life decisions. Your role is to present options and manage execution of the client's choices, not to make those choices for them.

LUCIA'S INSIGHT

- *Position yourself as a relocation project manager and lifestyle coordinator, not as an agent or advisor. This distinction protects you legally and sets the right expectations.*
- *The cleaner your positioning, the easier it is to explain your value to a new client. 'I manage the entire process so you only have to make decisions' is a sentence that resonates immediately.*

The First Client Conversation

The questions that scope the engagement and build immediate trust.

The first conversation with a potential relocation client is one of the most important you will have. It sets the tone, establishes your credibility, and if done well, tells you everything you need to know to scope the engagement accurately. Come prepared. Listen more than you speak. And ask the questions that reveal the real situation, not just the surface one.

ESSENTIAL QUESTIONS

● **What is driving the decision to relocate?**

Tax, security, lifestyle, business, family, education. The reason shapes everything. A client moving for security needs are different from a client moving for a better quality of life, even if the destination is the same.

● **Is there a timeline, and how firm is it?**

Some relocations are urgent, driven by a specific legal or tax deadline. Others are aspirational with no fixed date. Understanding this determines how you structure the engagement and how you prioritise your work.

● **Who is relocating?**

The primary client, a partner, children, elderly parents, pets. Each person and each animal adds layers of complexity. A family of five with three school-age children is a fundamentally different project from a single individual moving alone.

● **Do they have a destination in mind, or do they need help deciding?**

Some clients arrive with a clear destination. Others are weighing multiple options and need guidance. If they need help choosing, destination consulting becomes part of your scope and should be priced accordingly.

● **Have they started any processes already?**

Immigration applications, property searches, school enquiries. Understanding what has already been done prevents duplication and helps you identify gaps in the existing approach.

● **What does their current household look like?**

Properties owned or rented, household staff, vehicles, art, wine collections, animals. The volume and complexity of what needs to move or be managed during the transition is a major factor in scoping the engagement.

● **What is their biggest concern about the move?**

This question reveals the emotional dimension of the relocation. The answer is often not logistical. It might be the children's schooling, a spouse's reluctance to leave, uncertainty about a new culture, or the complexity of exiting a previous tax jurisdiction. Knowing the real concern allows you to address it directly.

LUCIA'S INSIGHT

- *Take detailed notes during the first conversation. Send a brief summary to the client within 24 hours. This signals professionalism before you have even sent a proposal.*
- *The client who seems certain about their destination often has doubts they have not voiced. Create space for those doubts. Addressing them early prevents problems later.*
- *Never underscope a relocation engagement. It is far better to present a comprehensive proposal and negotiate down than to take on a project and discover it is larger than anticipated.*

Contracts and Legal Responsibilities

What to put in writing before a single task begins.

Relocation engagements involve significant financial transactions, sensitive personal information, coordination of legal and financial specialists, and decisions that affect people's lives in fundamental ways. You need a contract. A clear, specific, written agreement that protects both you and your client before anything else happens.

WHAT YOUR CONTRACT MUST COVER

● **Scope of services in detail**

List every service you are providing. Be specific. Property search coordination, school research, immigration specialist sourcing, household setup, cultural orientation. Anything not listed is outside scope and subject to additional fees. Vagueness in a contract is always resolved against the service provider.

● **What is explicitly excluded**

Legal advice, tax advice, property agency services, financial planning. State clearly what you are not doing and who is responsible for those areas.

● **Fee structure and payment terms**

Your retainer or project fee, when it is due, what triggers additional billing, and your payment terms. For relocation engagements, a deposit of 30-50% upfront is standard. The balance is typically structured in milestones tied to key phases of the move.

● **Expense management and reimbursement**

If you are incurring costs on the client's behalf, state how these are tracked, how often you invoice for reimbursement, and what authorisation is required before committing to a significant expenditure.

● **Confidentiality and data handling**

Relocation involves highly sensitive personal information. Passports, financial documents, medical records, children's details. Your contract must include a confidentiality clause and a clear statement of how you handle, store and dispose of personal data, particularly relevant under GDPR in Europe.

● **Liability limitations**

You are a coordinator, not an insurer. Your contract should clearly limit your liability for the actions or omissions of third-party specialists you introduce. You recommend and coordinate; you do not guarantee the performance of external advisors, agents or contractors.

- **Termination clauses**

What happens if the client decides not to relocate, or changes destination mid-engagement. How much of the fee is retained. What notice is required. These situations do occur and you need a clear framework to handle them professionally.

- **Governing law**

Which country's law governs the contract. For international engagements, this matters. Get legal advice when in doubt.

LUCIA'S INSIGHT

- *Have your contract template reviewed by a lawyer in your jurisdiction before you use it. This is a one-time investment that protects every future engagement.*
- *A client who is uncomfortable with a detailed contract is a client who has not fully considered what they are asking you to manage. The contract protects them as much as it protects you. Frame it that way.*
- *For international engagements, consider having separate contracts for different phases of the project. Pre-departure planning, destination setup and post-arrival support can each be scoped and priced independently.*

SECTION 05

Pricing and Ways of Working

How to structure your fees, your time and your offer.

Relocation is one of the highest-value service categories in luxury concierge, and one of the most complex to price. There is no single right model. The right structure depends on the scope of the engagement, the client's situation and your own preferred way of working. What matters most is that your pricing reflects the genuine value of what you are doing and that it is agreed in writing before you begin.

PRICING MODELS AND INDICATIVE RANGES

SERVICE	RATE RANGE	MODEL
Initial consultation	\$150 - \$500	Fixed fee
Destination consulting	\$500 - \$2,000	Fixed fee
Full relocation management	\$5,000 - \$25,000+	Project fee
Pre-departure only	\$1,500 - \$5,000	Phase fee
Destination setup only	\$2,000 - \$8,000	Phase fee
Ongoing retainer post-move	\$500 - \$3,000/mo	Monthly retainer
Single specialist sourcing	\$300 - \$800	Fixed fee
School search and placement	\$1,000 - \$3,500	Fixed fee
Property search coordination	\$1,500 - \$5,000	Fixed fee or % of rent

WAYS OF WORKING

● Full relocation management

You manage the entire process from initial briefing to settled client.

This is the most comprehensive and highest-value engagement. Typically priced as a project fee based on the complexity and geography of the move.

A family relocating internationally with children, property requirements and multiple specialists is a 3-6 month engagement at minimum.

● Phase-based engagement

The client engages you for specific phases only: pre-departure planning, destination setup, or post-arrival support. This works well for clients who have already started the process or who want to test working with you before committing to the full scope. Price each phase clearly and independently.

- **Specialist sourcing only**

Some clients have the process largely in hand but need access to your network. You source and brief the right immigration lawyer, school consultant or property finder. Bill on a fixed fee per specialist sourced. This is a lower-commitment entry point but can grow into a fuller engagement.

- **Ongoing post-relocation retainer**

Once the client is settled, many need ongoing lifestyle management in their new location. This transitions naturally into a standard concierge retainer and is one of the most valuable long-term outcomes of a well-executed relocation engagement.

LUCIA'S INSIGHT

- *Always present pricing in phases. A client who sees a large total number may hesitate. A client who sees a clear phase-by-phase structure with defined deliverables understands what they are paying for.*
- *Do not undercharge because you are new to relocation. Your value is in the coordination, the network and the single point of contact. That value is real regardless of how many relocations you have managed.*
- *Commission from specialist referrals is common in some markets. Be transparent with your client about any commission arrangements. Transparency builds trust. Hidden commissions destroy it.*

Pre-Departure Planning

Everything that needs to happen before the client leaves.

The pre-departure phase is where the relocation is won or lost. A well-planned departure sets the client up for a smooth arrival. A rushed or incomplete one creates a cascade of problems that follow them to the new country. Your role in this phase is to ensure nothing is forgotten, nothing is left to chance, and the client arrives at their destination ready to begin their new life rather than still managing the old one.

DOCUMENTATION

- **Passport and visa status for all family members**

Check expiry dates, ensure all required visas are in place, verify entry requirements for the destination country. For children, confirm that all required consents are in order, particularly relevant if parents are separated.

- **Document gathering and secure storage**

Birth certificates, marriage certificates, educational qualifications, professional licences, medical records, vaccination records, insurance documents, property deeds, financial statements. Compile, scan and store securely. Physical originals should travel with the client, not in the removal shipment.

- **Notarisation and apostille where required**

Many countries require official documents to be apostilled or notarised for use abroad. This process takes time. Identify requirements early and build lead time into the plan.

FINANCIAL PREPARATION

- **International bank account established**

The client should have a functioning bank account in the destination country before they arrive. This is harder than it sounds in many jurisdictions and often requires proof of address, which requires accommodation, which requires a bank account. Navigate this chicken-and-egg problem early with the right local banker.

- **Currency and funds transfer arranged**

Large international transfers attract scrutiny and can be delayed. Coordinate with the client's financial advisor to ensure funds are in place when needed. For property transactions, timing is critical.

- **Credit history and financial footprint in new country**

Many HNWI clients discover that their significant wealth does not automatically translate into creditworthiness in a new jurisdiction. Brief them on this reality and help them establish the right relationships with local private banks.

PROPERTY AND POSSESSIONS

● **Current property handled**

Sale, rental or maintenance during absence. If renting out, a property manager needs to be in place before departure. If selling, the timeline needs to be coordinated with the arrival. If keeping empty, security, insurance and maintenance arrangements must be confirmed.

● **Removal and shipping arranged**

International removals for HNWI clients require specialist companies experienced in handling art, antiques, wine collections and other high-value items. Get multiple quotes, check insurance coverage, and confirm customs requirements at the destination. Delivery dates must be coordinated with the availability of the new property.

● **Storage arranged for items not going immediately**

High-value items that are not being shipped immediately need secure, climate-controlled storage. Art, wine, antiques and documents require specialist facilities.

LUCIA'S INSIGHT

- *Build a master pre-departure checklist specific to the client and destination. Share it with the client and review it together. Nothing communicates professionalism more clearly than a document that shows you have thought of everything.*
- *Start the apostille and notarisation process at least 8 weeks before departure. Government processing times vary enormously and cannot be rushed.*
- *Brief the client on what to carry personally versus what to ship. Travel documents, medications, irreplaceable personal items and enough cash or cards for the first two weeks should always travel with the client.*

Housing and Property

Finding, viewing, negotiating and securing the right home.

Housing is almost always the most emotionally significant part of a relocation. It is also the most complex. Different countries have radically different property markets, legal frameworks, rental norms and purchasing processes. Your role is to navigate this landscape on behalf of the client, coordinate the right local professionals, and ensure the client ends up in a home that genuinely works for their lifestyle.

- **Define the brief before approaching any agent**

Budget, size, configuration, location priorities, must-haves and non-negotiables. School catchment areas if relevant. Security requirements. Access to specific amenities. The more specific the brief, the more efficient the search.

- **Always use a local property finder or buying agent**

In most markets, a local property specialist who works exclusively for buyers adds significant value. They know what is not yet on the market, they understand local pricing, and they can negotiate on the client's behalf. Source one in every key destination where you have clients.

- **Temporary accommodation for arrival**

The client should not arrive without confirmed accommodation. If the permanent property is not yet ready, a serviced apartment or hotel suite needs to be arranged. Brief the property on the client's preferences and length of stay.

- **Understand the legal purchasing process for each country**

The process for buying property varies enormously. In France, a notaire manages the transaction. In the UK, solicitors handle conveyancing. In the UAE, there are specific rules for foreign ownership. Never assume one country's process applies to another.

- **Foreign ownership restrictions**

Many countries restrict or condition foreign property ownership. Some require residency. Some have additional purchase taxes for non-residents. Identify these restrictions before the client falls in love with a property they cannot legally buy.

- **Property inspection and due diligence**

Never allow a client to commit to a property without a professional inspection. Structural surveys, legal title searches, planning permission checks, service charge reviews for apartments. These are non-negotiable.

- **Lease negotiation for rentals**

Rental law varies significantly. Deposits, notice periods, break clauses, furniture and condition standards differ by country and sometimes by city. Have a local advisor review any lease before the client signs.

LUCIA'S INSIGHT

- *The client's ideal property brief at the start of the search is rarely what they end up choosing. Stay flexible and listen carefully as the viewings evolve their understanding of what they actually want.*
- *In hot markets, the ability to move quickly is a competitive advantage. Help the client prepare decision-making authority and financial readiness before the search begins.*
- *Keep a running shortlist document shared with the client. Include photos, key details, pros and cons for each property viewed. This makes comparison and decision-making significantly easier.*

Legal, Visa and Residency

The documentation landscape and the specialists who navigate it.

Immigration, visa and residency processes are among the most complex, time-sensitive and high-stakes elements of any relocation. They are also the areas where mistakes are most costly. Your role is to source the right specialist for each situation and ensure they are briefed, coordinated and delivering on time. You do not advise on immigration matters. You manage the process around the advice.

COMMON VISA AND RESIDENCY PATHWAYS

● Golden Visa programmes

Investment-based residency programmes offered by Portugal, Spain, Greece, UAE, Malta and others. Each programme has different investment thresholds, qualifying assets and processing timelines. Many have changed significantly in recent years. Always verify current requirements with a local immigration specialist.

● Non-habitual resident and special tax regimes

Countries including Portugal, Italy, Greece and Cyprus offer preferential tax regimes for new residents. These are highly attractive to HNWI clients but require careful planning and specific immigration status. The tax benefit and the residency process must be coordinated precisely.

● Investor and entrepreneur visas

The UK Global Talent visa, the US EB-5, the UAE investor visa and equivalent programmes in Singapore, Canada and Australia. Each has specific requirements around investment amount, job creation, qualifications or talent recognition. Application timelines range from weeks to years.

● Digital nomad and passive income visas

A growing category across Spain, Portugal, Italy, Greece, Thailand, Costa Rica and others. These typically require proof of income above a specified threshold and health insurance. Processing is generally faster than investment visas.

● Family reunification and dependent visas

When the primary client obtains residency, dependants typically apply separately. The definition of dependant, the qualifying relationships and the documentation required differ by country. Children from previous relationships, elderly parents and same-sex partners all need specific attention.

BUILDING YOUR IMMIGRATION SPECIALIST NETWORK

- **Source one trusted immigration lawyer per key destination**

Not a general lawyer who also does immigration. A specialist. Someone who works exclusively or primarily in immigration and residency for international clients. Ask for referrals from property agents, relocation companies and private banks in each market.

- **Understand their process and timelines**

Before recommending a specialist to a client, understand how they work. Do they handle all documentation themselves or outsource? What is their typical processing timeline? How do they communicate with the client? What happens if there is a complication?

- **Establish clear communication protocols**

You are the coordinator between the client and the specialist. Establish from the start how information flows. The client should not be sending documents directly to the lawyer without you being aware. You need to maintain the full picture at all times.

LUCIA'S INSIGHT

- *Immigration timelines are rarely as quick as clients hope. Set realistic expectations from the first conversation. Build buffer time into every plan.*
- *Keep copies of every document submitted as part of any immigration application. If something is lost or needs resubmission, you need to be able to respond immediately.*
- *Changes to visa and residency programmes happen frequently and sometimes with very little notice. Follow relevant legal and immigration blogs for the destinations where your clients are moving.*

Financial and Tax Considerations

What your client needs to understand and who should advise them.

Tax is often the primary driver of an HNWI relocation, and almost always a significant consideration even when it is not the main reason. The financial and tax dimensions of a move are complex, jurisdiction-specific and consequential. Your role is to ensure the client has the right advisors in place, that those advisors are coordinated with each other, and that the timeline of the move aligns with the financial and tax planning.

● Tax residency and exit planning

Becoming tax resident in a new country requires formally breaking tax residency in the old one. This is not automatic and the rules differ significantly by country. Some require a specific number of days abroad. Others require formal deregistration. Clients who assume they have left their old tax jurisdiction without taking the right steps face significant risk.

● The 183-day rule and its limitations

Many clients believe that spending fewer than 183 days in a country means they are not tax resident there. This is a common misconception. Many countries apply additional criteria including the location of the client's primary economic interests, family, property and social ties. Always refer to a qualified tax advisor for confirmation.

● Double taxation treaties

Most countries have bilateral treaties that determine which country has the right to tax specific types of income and assets. Understanding which treaty applies in a client's situation requires specialist advice. Do not attempt to interpret these yourself.

● Wealth and inheritance tax implications

Some destinations have no wealth tax or inheritance tax, which is a significant draw for HNWI clients. Others have provisions that can affect assets held in other countries. The full picture requires both an exit tax advisor in the country of departure and an entry tax advisor in the destination.

● Banking and financial account compliance

CRS, FATCA and other automatic exchange of information frameworks mean that financial accounts are now reported across borders. Clients need to understand their disclosure obligations in their new jurisdiction and ensure their existing banking arrangements are compliant.

● Pension and retirement provisions

The treatment of pensions, retirement accounts and social security entitlements varies significantly between countries. Clients approaching or in retirement need specific advice on how a relocation affects their pension income and entitlements.

LUCIA'S INSIGHT

- *The tax and financial planning for a relocation must begin well before the move, sometimes 12 to 24 months in advance. The earlier the client engages the right advisors, the more options they have.*
- *In your network, you need at minimum one international tax specialist per key destination. Ideally someone who understands both the exit jurisdiction and the destination.*
- *Never let the financial planning lag behind the logistics. A client who has moved physically but not completed their tax exit properly is in a very difficult position.*

Schools and Education

Finding the right school in a new country, for the right child.

For families with school-age children, the school search is often the most emotionally charged part of the entire relocation. It is also one of the most time-sensitive. The best international schools have waiting lists that can stretch years. Understanding how the school system works in the destination country, which schools fit the child's profile and how to navigate the application process is a specialised skill that is enormously valued by relocating families.

- **Understand the child's educational profile**

Current school, curriculum, academic level, languages, special educational needs, extracurricular priorities. A child in the International Baccalaureate system has different options from one in the British curriculum. A child with specific learning needs requires a school that can accommodate them. Understand the profile before you research options.

- **Map the school landscape in the destination**

International schools, local private schools, boarding options if relevant. Which curriculum systems are available. Fee ranges. Waiting list status for each year group. Location relative to the family's likely residence area.

- **Start the application process immediately**

The best international schools in Dubai, Singapore, London, Geneva and other HNW destinations are heavily oversubscribed. Applications need to go in as soon as the destination is confirmed, sometimes before the family has secured accommodation. Waiting to be settled before applying is a common and costly mistake.

- **Use a school placement specialist**

In major cities, specialist consultants work exclusively on school placements for international families. They know which schools have genuine availability, which ones have waitlists that move and which ones are right for specific child profiles. Their fees are well justified by the time and stress they save.

- **Arrange school visits where possible**

A family should visit their shortlisted schools before making a final decision. This can be coordinated as part of a pre-arrival scouting trip. For children old enough to have an opinion, their impression of the school matters significantly to how well they adapt.

- **Transition support for the child**

Changing schools in a new country is a significant event for a child. Brief the family on what to expect. Some schools offer buddy programmes, settling-in sessions and pastoral support for new international students. These matter and are worth asking about specifically.

● **University implications for older students**

For families with children in their final years of secondary school, the impact of a curriculum change on university applications is a significant consideration. The IB is widely recognised internationally. A mid-stream switch from one national curriculum to another can create complications. Specialist advice is important.

LUCIA'S INSIGHT

- *A family that has found the right school for their children is a family that has committed to the destination. Solving the school question early anchors the entire relocation.*
- *Keep a database of school placement specialists in every city where you regularly work. This is one of the most requested referrals in family relocation.*
- *For boarding school options, timing is different. Applications often close early and the selection process can take months. Identify this as a separate workstream from the main relocation if it is relevant.*

Healthcare and Wellness

Building a new medical and wellness network in a new country.

Healthcare is one of the areas that HNWI clients feel most anxious about when relocating. They have established relationships with trusted doctors, specialists and wellness providers. They know their own medical history is held by professionals who know them. Starting again in a new country feels exposing. Your job is to make this transition as seamless as possible by ensuring the right medical relationships are in place before they are needed.

- **Medical records transfer**

Obtain copies of all medical records for every family member before departure. In many countries this requires a formal request and may take several weeks. Records should be translated if the destination uses a different language, particularly for children's vaccination records and any chronic condition management documentation.

- **Private GP and specialist sourcing**

Identify a trusted private GP in the destination city before the client arrives. For clients with existing conditions, identify the relevant specialists too. Use referrals from other concierge contacts, private banks and relocation companies with established networks in the destination.

- **Health insurance**

International health insurance policies differ significantly. Some destinations require specific local coverage. Some HNWI clients have existing international policies that may or may not cover the new country adequately. Have this reviewed by a specialist broker before the move. Gaps in coverage discovered after a medical event are unacceptable.

- **Prescription medication management**

Medications that are readily available in one country may be restricted, require a local prescription, or not be available at all in another. Identify any regular medications the family takes, check their availability and legal status in the destination, and plan accordingly. A 3-month supply brought from the origin country, with a letter from the prescribing doctor, is often the right starting approach.

- **Wellness and mental health providers**

Therapists, coaches, nutritionists, personal trainers. For clients who maintain an active wellness practice, continuity of these relationships matters for wellbeing during what is inherently a destabilising period. Source alternatives in the destination and, where possible, identify practitioners who offer video sessions to bridge the gap.

- **Dental and specialist registrations**

Register with a dentist and any relevant specialists in the new location as soon as possible. The best practitioners in major cities often have waiting lists. Getting on them early prevents problems later.

LUCIA'S INSIGHT

- *Healthcare anxiety is real and legitimate. Acknowledging it directly with the client, and showing them you have a plan, builds significant trust.*
- *For clients with serious or complex medical conditions, involve a medical concierge specialist. This is a distinct subspecialty and one where generalist coordination is not sufficient.*
- *Children's vaccination records are required for school registration in most countries. Ensure these are apostilled or otherwise certified for international use well before departure.*

Household Setup and Staff

Getting the new home operational to the expected standard.

For an HNWI client, arriving at a new property that is fully set up, properly stocked and staffed to their standard is not a luxury. It is the baseline expectation. Creating that experience in a new country, often at short notice and without the established supplier relationships you would have at home, requires preparation, local knowledge and a very specific kind of attention to detail.

- **Pre-arrival setup visit**

Before the client arrives, the property should be inspected, cleaned, stocked and prepared. If staff are in place, they should be briefed. If furniture or possessions have been delivered, they should be positioned and unpacked. The client should walk into a home that is ready, not a work in progress.

- **Household staff sourcing in the new location**

Housekeeper, cook, driver, nanny. Each country has a different labour market for household staff, different employment law and different cultural norms around domestic work. Source through specialist household staffing agencies in the destination. Never source purely from online platforms without proper vetting.

- **Employment law compliance**

Household staff employment law varies enormously. Contracts, minimum wages, social security contributions, notice periods and tax withholding requirements differ by country. Brief the client and ensure they are compliant from day one. Employment law violations are reputationally and financially damaging.

- **Utilities and essential services setup**

Electricity, gas, water, internet, telephone. In some countries this is straightforward. In others it requires local ID, proof of address and weeks of processing time. Start this before the client arrives. Internet connection in particular is often taken for granted and missed acutely when absent.

- **Grocery and provisioning**

The property should be stocked with the client's preferred provisions on arrival. Identify local suppliers for their regular items, establish accounts with premium food delivery services and identify any specialist suppliers for dietary requirements or preferred brands.

● Home systems orientation

New properties, especially in different countries, have unfamiliar systems. Heating and cooling controls, security systems, smart home technology, local appliances. Brief the staff and, where relevant, the client directly. A written household guide is an excellent deliverable at this stage.

LUCIA'S INSIGHT

- *The first night in the new home sets the emotional tone of the entire relocation. Make it exceptional. Fresh flowers, a stocked kitchen, a prepared dinner, the right temperature, familiar scents. These details cost little and mean everything.*
- *Build relationships with premium grocery delivery services, specialty food importers and wine merchants in every key destination. These become recurring supplier relationships across multiple clients.*
- *Household staff hired in a new country do not know the client. Invest time in a proper onboarding and briefing process. The standards document you create for one client can be adapted for future clients in the same destination.*

Cultural Integration

Helping the client and their family actually feel at home.

The practical dimensions of a relocation can be managed with enough planning. The human dimensions are harder. Culture shock, social isolation, the loss of familiar routines and the difficulty of building new relationships in a new country are real experiences that affect even the most worldly and adaptable clients. The concierge who addresses this dimension proactively is the one who truly earns lifelong loyalty.

● **Country and city orientation briefing**

A structured introduction to how things work in the new country. Not a tourist overview, but a practical guide. How the postal system works. How to navigate healthcare bureaucracy. What the social norms are around punctuality, formality, tipping, negotiation. What surprises people most. What frustrates them. This is insider knowledge and it is genuinely valuable.

● **Language support**

Even in countries where English is widely spoken, some knowledge of the local language changes the experience entirely. Source language tutors, identify online resources and, for countries where English is not widely spoken, arrange for an interpreter during key early interactions such as school meetings, legal appointments and medical consultations.

● **Social and community introductions**

HNWI clients often arrive in a new country without a social network. Help them find their people. Expat communities, private members clubs, professional networks, charitable organisations, sports clubs, art institutions. Match the introduction to the client's actual interests, not generic expat groups.

● **Private members clubs and exclusive venues**

In most major cities, private members clubs serve as the social infrastructure of the HNWI world. Soho House, The Arts Club, local equivalents. Membership applications take time and often require existing member references. Start the process early and use your network to facilitate introductions.

● **Understanding local business culture**

For clients who are also establishing business interests in the new country, a briefing on local business culture is essential. Meeting norms, decision-making processes, relationship-building expectations and negotiation styles all differ and misunderstanding them costs time and relationships.

- **Check-ins during the first three months**

The first three months after arrival are the highest-risk period for relocation regret. Schedule regular check-in calls with the client. Ask specifically about how the family is settling, not just whether the practical matters are resolved. Early identification of problems allows early intervention.

LUCIA'S INSIGHT

- *Culture shock affects clients who would never describe themselves as susceptible to it. The disruption of familiar routines is cumulative and often hits hardest 6-8 weeks after arrival, when the novelty has worn off.*
- *A client who is thriving socially in their new country is a retained client. A client who is isolated and struggling will often blame the destination and consider moving again. Your social integration support directly affects your long-term engagement.*
- *If a partner or spouse is not working and has lost their professional identity in the move, they are at particular risk of isolation. Pay specific attention to this and address it proactively.*

Pet Relocation

The documentation, logistics and welfare of relocating animals.

For many HNWI clients, their pets are family members and their welfare during a relocation is a genuine priority. Pet relocation is also one of the most administratively complex elements of an international move, with requirements that vary significantly by species, breed, origin country and destination country. Get this wrong and a pet can be quarantined, refused entry or, in extreme cases, returned to the origin country.

- **Research destination country requirements immediately**

Entry requirements for pets differ enormously. Some countries are rabies-free and have strict biosecurity protocols. Australia, New Zealand, the UK, Japan and Hawaii have some of the strictest requirements globally, including mandatory quarantine periods. The EU Pets Passport system simplifies movement within Europe but has specific microchipping and vaccination requirements. Start this research the moment the destination is confirmed.

- **Microchipping and vaccination requirements**

Most countries require microchipping and rabies vaccination as a minimum. Some require additional vaccinations, titre tests to prove immunity levels, parasite treatments or health certificates issued within a specific window before travel. The sequence and timing of these requirements matters and must be followed precisely.

- **Breed-specific restrictions**

Many countries restrict or ban certain breeds. Pit bulls, Rottweilers, Dobermans and other breeds classified as dangerous are subject to restrictions in multiple jurisdictions. Some destinations ban them entirely. Identify any breed restrictions for the destination before planning the move.

- **Specialist pet relocation companies**

For international moves, use a specialist pet relocation company rather than attempting to manage the process yourself. They have established relationships with airlines and destination country authorities, they know the documentation requirements inside out, and they can handle the logistics of pet travel in a way that minimises stress for the animal.

- **Travel arrangements for the pet**

Small pets can often travel in-cabin on commercial flights. Larger animals must travel as cargo. Private jet travel eliminates most of these complications but must still comply with destination country health requirements. Brief the client on the options and their relative costs and stress levels for the animal.

- **Settling in arrangements at the destination**

Identify a vet near the new property before arrival. Research local pet supply suppliers, dog walkers and groomers if relevant. For horses or other large animals, the accommodation and settling in requirements are even more specific and require specialist coordination.

LUCIA'S INSIGHT

- *Never leave pet relocation logistics until the last minute. Some health certificates must be issued within 10 days of travel but the processes that lead up to them can take months.*
- *A client whose pet has a difficult travel experience will remember it. If possible, arrange for private jet travel for larger dogs. The welfare and stress reduction justifies the cost for clients who can afford it.*
- *Build a relationship with one excellent specialist pet relocation company. This is a genuinely niche service area and a good specialist is worth more than any research you could do independently.*

Building Your Supplier Network

The external specialists every relocation concierge needs.

Your value as a relocation concierge is directly proportional to the quality of your specialist network. You cannot be an expert in immigration law, international tax, property markets, school placements, pet logistics and cultural integration simultaneously. But you can know exactly who the best person is in each area, in each key destination, and be able to reach them when a client needs them.

ESSENTIAL SPECIALISTS PER DESTINATION

● Immigration lawyer

Specialising in HNWI relocation, with deep knowledge of residency and visa programmes in the destination country. Should have experience with clients from multiple origin countries and a clear understanding of international wealth structuring.

● International tax advisor

Ideally one who covers both the exit jurisdiction and the destination, or who has a trusted partner in the exit country. The coordination between exit and entry tax planning is critical and often missed when two unconnected advisors work in isolation.

● Property finder or buying agent

A buyer's agent who works exclusively for the purchaser, not the seller. Someone with access to off-market properties and a genuine understanding of HNWI requirements in terms of security, space, quality and location.

● School placement consultant

Specialist knowledge of the international school landscape in the destination. Should have relationships with admissions teams and a track record of placing children in oversubscribed schools.

● International removals company

Experienced in handling high-value items including art, antiques, wine and bespoke furniture. Should have full insurance coverage for international moves and experience navigating customs in the destination country.

● Pet relocation specialist

A company or individual who manages the full documentation and logistics of international pet travel. Should have direct relationships with airlines and destination country veterinary authorities.

● Private banker

A relationship banker at a private bank in the destination country who can facilitate account opening, mortgage if required, and introductions to other relevant financial services.

- **Healthcare concierge or medical specialist**

A trusted GP or private clinic with experience serving international patients. Ideally someone who can also facilitate specialist referrals and who is accustomed to the expectations of HNWI clients.

LUCIA'S INSIGHT

- *Build your network before you need it. The worst time to find an immigration lawyer is when a client needs one in the next two weeks.*
- *Vet every specialist before adding them to your network. A referral from another trusted concierge is worth more than any directory listing.*
- *Maintain relationships with your network through regular contact, referrals and acknowledgement of good work. Your specialists should want to hear from you.*
- *Be transparent with clients about how your specialist relationships work. If you receive referral fees, disclose them. If you do not, say so. Transparency is the foundation of trust in this profession.*

Regional Considerations

What changes across Europe, Middle East, Americas and Asia.

Relocation is not a universal process. The practical, legal, cultural and logistical dimensions vary significantly by region and by destination. The following is a framework of key considerations for the regions most commonly chosen by HNWI clients. It is not exhaustive but it gives you the starting point for understanding what is different about each one.

EUROPE

- **Western Europe (UK, France, Switzerland, Monaco)**

Mature, stable and highly desirable. Property markets in London, Paris, Geneva and Monaco are among the most expensive globally. Immigration frameworks are complex and have changed significantly post-Brexit for UK-EU movement. Switzerland and Monaco have strict residency quotas. Tax planning is essential in all four jurisdictions.

- **Southern Europe (Portugal, Spain, Italy, Greece)**

Major growth markets for HNWI relocation driven by Golden Visa programmes, preferential tax regimes and quality of life. Portugal's NHR programme has changed significantly. Spain's Beckham Law and Greece's flat-tax regime remain attractive. Italy's non-dom regime is increasingly popular. Processing times vary but have generally lengthened as volumes increase.

- **Eastern Europe (emerging markets)**

Lower cost of living, growing infrastructure and EU access make countries like Croatia, Bulgaria and Romania increasingly relevant for certain client profiles. Legal and banking infrastructure is less developed than Western Europe. Local specialist knowledge is essential.

MIDDLE EAST

- **UAE (Dubai and Abu Dhabi)**

The dominant HNWI destination in the region. Zero personal income tax, excellent infrastructure, strong international school options, high quality private healthcare and a genuinely cosmopolitan environment. The Golden Visa programme offers 10-year residency. Property market is active and accessible to foreign buyers. Arabic is the official language but English is almost universally spoken in HNWI contexts.

- **Qatar, Bahrain and Saudi Arabia**

Growing markets with specific requirements and cultural considerations. Saudi Arabia in particular is opening significantly to international residents and investors through its Premium Residency programme. Understanding the cultural and legal framework is essential before advising clients on these destinations.

AMERICAS

● **United States**

Complex immigration landscape with no straightforward HNWI residency route without significant investment or qualifying employment. The EB-5 investor visa requires substantial investment and a lengthy process. Many HNWI clients pursue the E-2 treaty investor visa or the O-1 extraordinary ability visa depending on their profile. Tax implications of US residency are significant and require specialised advice.

● **Latin America (Panama, Costa Rica, Uruguay, Colombia)**

Growing interest from HNWI clients seeking lower cost of living, political stability relative to the region, and accessible residency programmes. Panama and Uruguay in particular have established HNWI communities and clear residency pathways. Uruguay is notable for its political stability, strong rule of law and attractive territorial tax system.

● **Caribbean**

Citizenship by investment programmes in St Kitts and Nevis, Antigua, Dominica, Grenada and St Lucia offer passports in exchange for qualifying investments. These programmes are used by clients seeking visa-free travel, tax planning benefits and second citizenship rather than primary residency.

ASIA PACIFIC

● **Singapore**

The premier HNWI destination in Asia. Exceptional infrastructure, rule of law, international schools, healthcare and connectivity. The Global Investor Programme offers residency in exchange for qualifying investments. Property market is accessible but expensive. The city-state's compact geography and efficiency make it uniquely liveable.

● **Australia and New Zealand**

Strong rule of law, excellent education systems and high quality of life. Investment visa programmes exist but have been restructured in recent years. Pet import requirements are among the most stringent globally. Distance from other major markets is a consideration for clients with global business interests.

● **Japan and Thailand**

Growing interest from specific client profiles. Japan's culture and safety are significant draws but the language barrier and residency framework are genuine challenges. Thailand's long-term residency visa and Elite Visa programme attract retirees and digital nomads more than ultra-wealthy families.

LUCIA'S INSIGHT

- *Residency and tax programmes change frequently. Always verify current requirements with a local specialist before advising a client. Information that was accurate six months ago may not be today.*
- *The best destination for a client is not necessarily the most popular one. It is the one that fits their specific profile, priorities and circumstances. Ask the right questions before making any recommendations.*
- *Building regional knowledge takes time. Start with the one or two destinations where you have the most client interest and build depth there before expanding.*

After the Move

The ongoing relationship and the services that follow.

A successful relocation does not end when the client is settled. It is the beginning of a long-term relationship. The client who has trusted you with one of the most significant transitions of their life is, if you have served them well, one of the most loyal and valuable clients you will ever have. The question is what you offer them next.

- **Ongoing lifestyle management retainer**

The most natural next step. The client is in a new country with an incomplete supplier network and an evolving understanding of how things work locally. An ongoing concierge retainer gives them continuity of support as they settle in. Price this as a monthly retainer with a defined scope and a minimum 3-month commitment.

- **Household management**

If the client has established a new household with staff, the coordination and management of that household is a natural extension of the relocation engagement. Use the In-House Services Manual framework for this scope of work.

- **Travel concierge**

Clients who have relocated internationally are often frequent travellers, maintaining relationships in their origin country and other markets. Travel planning and management becomes a recurring service. Use the Travel Planning Manual framework.

- **Second property and multi-residence management**

Many HNWI clients maintain properties in multiple countries after relocation. Managing the household systems, staffing and maintenance of a property the client is not currently occupying is a valuable and recurring service.

- **Referral management**

A client who is happy in their new country will tell others. In the HNWI world, personal referrals are the most powerful source of new business. Ask satisfied clients if they know others who are considering a similar move. Handle any referral introduction with the same professionalism and discretion as every other aspect of your service.

- **Annual review**

Schedule an annual check-in with every relocation client. Review what is working, what has changed, what new needs have emerged. This keeps the relationship active, demonstrates continued care, and often surfaces new engagement opportunities before the client has thought to ask for them.

LUCIA'S INSIGHT

- *The post-relocation retainer is often worth more over time than the relocation engagement itself. Do not let the relationship go quiet when the move is complete.*
- *Stay in touch with clients even when there is no active engagement. A monthly message sharing something relevant to their new location, an article about their destination, a recommendation for a new restaurant, costs almost nothing and maintains the relationship.*
- *Clients who have relocated once often relocate again. Political and economic conditions change. Family circumstances change. Life changes. Being the trusted professional from the last move means you are the natural first call for the next one.*

A FINAL NOTE

The world is moving. Be the one who moves it.

Relocation concierge is not a service you offer. It is a relationship you build during one of the most significant moments in a person's life. When someone trusts you to help them move their family, their home, their life from one country to another, the stakes are real and the responsibility is genuine.

The clients who come to you for relocation support are not looking for a logistics coordinator. They are looking for someone who understands both the complexity and the humanity of what they are undertaking. Someone who can hold the detail and the emotion simultaneously. Someone who makes them feel that it is going to be alright.

That is the standard this manual is built to help you reach. Not in theory. In practice, in the field, with real clients whose lives are genuinely in transition.

Start with the section most relevant to where your first client is right now. Build the rest as you go. And as your experience grows, add to what is here. The best relocation concierges are the ones who never stop learning from the moves they manage.

The world is moving. The demand for people who can help HNWI clients navigate that movement has never been higher. And the professionals who build this expertise now will be the ones clients turn to for years to come.

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