

PRE-MOVE RESEARCH - QUICK REFERENCE

Leaving the UK family checklist

Use this UK-specific quick reference alongside the detailed SettleHappy guides. Tick an item only when the evidence or confirmation is saved in your family move folder.

MOVING FROM	DESTINATION / CITY	PLANNING CURRENCY	LAST CHECKED
_____	_____	_____	_____

HOW TO USE

Read the linked SettleHappy guide first. Tick an item when the answer or evidence is saved in your own move folder. Recheck volatile facts before paying or applying.

1 Six to three months before

- ☐ Confirm a lawful destination residence, work and study route for every family member.
- ☐ Map expected UK days, workdays, homes and family ties for the Statutory Residence Test.
- ☐ Decide whether to keep, rent or sell the UK home after modelling tax, costs and flexibility.
- ☐ Secure suitable school, healthcare and insurance routes before fixing the final moving date.

2 Three months to four weeks before

- ☐ Ask banks, brokers, pension and ISA providers whether they will serve residents of the destination.
- ☐ Collect concise medical, prescription, vaccination, school and family records in portable formats.
- ☐ Review wills, guardianship, powers of attorney and child-travel consent where relevant.
- ☐ Check destination rules for medicines, driving, pets, shipping and document authentication.

3 Four weeks to departure

- ☐ Use the correct HMRC route: P85, Self Assessment with SA109, or both where current guidance requires it.
- ☐ Notify council tax, benefits offices and the Student Loans Company where the rules apply.
- ☐ Tell the GP about a permanent move and finalise medication, referrals and the healthcare handover.
- ☐ Update lenders, insurers and financial providers using confirmed dates and truthful residence details.

4**Final week and journey**

- ☐ Keep passports, approvals, certificates, medicines, insurer details and two payment routes in hand luggage.
- ☐ Record property condition, meters, keys, luggage contents and important serial numbers.
- ☐ Protect any empty UK property in line with lender and insurer conditions.
- ☐ Save the first 72 hours of accommodation, transport, school, clinic, embassy and emergency information offline.

5**First 90 days abroad**

- ☐ Complete local residence, address, tax, healthcare, school and driving registrations by their deadlines.
- ☐ Confirm HMRC acknowledgement, PAYE refund or Self Assessment plan instead of assuming it is complete.
- ☐ Keep a live UK-day and workday log from day one and retain travel evidence.
- ☐ Review property, pensions, investments, insurance and estate planning on scheduled dates rather than leaving them indefinitely.

Information, not regulated immigration, legal, tax, financial or medical advice. Verify current requirements with issuing authorities, providers and appropriately qualified advisers.