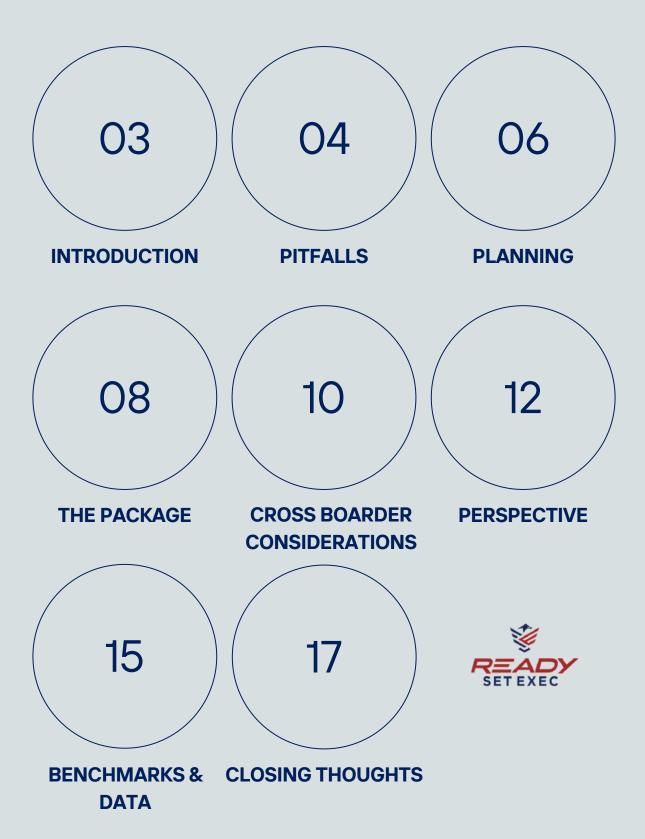


The Executive Relocation Playbook

Everything you need to know to **relocate executives** without disrupting momentum or morale.

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Why Executive Relocation Matters:

Relocating an executive isn't just about moving a person from point A to B. It's about minimizing disruption, supporting a seamless transition, and laying the foundation for long-term success. When done well, relocation boosts morale, retention, and performance. When done poorly, it jeopardizes all three.

Who This Guide Is For?

This guide is designed for HR leaders, hiring managers, and executive teams who are moving senior talent—either across cities or across borders. Whether it's an external hire or an internal promotion requiring relocation, the stakes are high. We're here to help you get it right.

How to Use This Playbook

We've broken this guide into practical, digestible sections. You'll find clear timelines, package recommendations, stakeholder roles, and a candidate-first lens throughout. Each section is designed to help you anticipate issues before they happen and build a process that's efficient, human, and strategic.



Common Pitfalls and How to Avoid Them

Even well-resourced organizations underestimate what it takes to relocate executive talent. These are the most common missteps:

No Job Security in the Offer

Relocation involves risk. If the role doesn't work out, the executive needs a soft landing.

Fix it: Offer a structured transition and a pre-negotiated exit plan, including severance and return support.

Compensation That Doesn't Justify the Move

Executives rarely relocate for the same salary.

Fix it: Justify the move with a clear upside—higher pay, better cost of living, or improved quality of life.

Minimal Support for the Move Itself

Leaving them to figure it out creates unnecessary friction.

Fix it: Offer full logistical support—housing help, paid relocation days, moving services, and spousal/job assistance.

Underestimating Family Impact

If the family isn't on board, the move is likely to fail.

Fix it: Include school search, spousal job support, and cultural orientation in the relocation package.



The Cost of Getting It Wrong

Poorly managed relocations lead to:

- Declined offers or last-minute withdrawals
- Disengagement during transition
- Early exits (within 6-12 months)
- Brand damage in tight talent markets

The direct cost of a failed executive hire is high. Add the cost of a failed relocation—and the bill multiplies.

What Great Relocations Have in Common:

The best companies:

- Treat relocation as part of onboarding, not an afterthought
- Plan 6-12 months in advance
- Design relocation packages that support the person, not just the position
- Build in flexibility—because life happens





Early Planning (6-12 Months Before the Move)

- Identify the need for relocation early in the hiring or promotion process.
- Discuss relocation benefits and expectations with the executive.
- Begin work permit or visa research if cross-border.
- Outline a high-level timeline aligned with business needs.
- Conduct initial needs assessments (family, housing, education, etc.).

Mid-Term Planning (3-6 Months Out)

- Finalize the relocation offer and terms (compensation, severance, benefits).
- If a trial period is needed, begin short-term travel (e.g., weekly commuting).
- Engage relocation vendors for moving, housing search, and school enrollment.
- Begin legal, tax, and payroll planning across jurisdictions.
- Support spousal job transition and family logistics.

Final Preparations (1–3 Months Out)

- Lock in housing arrangements (purchase, rental, or temporary housing).
- Confirm visas, travel documents, and immigration support.
- Organize packing and transportation.
- Schedule cultural orientation, executive coaching, and community onboarding.
- Communicate the transition plan internally (and externally, if relevant).

Internal Alignment and Stakeholders

A smooth relocation requires coordination across functions. At a minimum, involve:

- HR Oversees the package, compliance, and onboarding.
- Legal/Tax Advisors Manages immigration, contracts, and compensation.
- Finance Handles payroll changes, currency, tax equalization.
- Leadership Ensures strategic alignment and sets expectations.
- Relocation Specialists Provide housing, school, and move logistics.

Building the Timeline

Each relocation is different. But strong programs share a few patterns:

- Start early. The best relocations are proactive, not reactive.
- Include buffers. Timelines shift—factor in contingencies.
- Keep stakeholders aligned. Weekly or biweekly updates help avoid bottlenecks.
- Respect the human side. Big moves need emotional and logistical space.



What a Relocation Package Should Include

An effective relocation package removes friction and reinforces commitment. It's not about generosity — it's about reducing uncertainty and enabling focus from day one.

Housing Support

Mac Home Sale or Purchase Assistance

- Real estate agent fees, legal closing costs, and inspections
- Mortgage guidance or leasing support
- Bridge loans or housing stipends when applicable

Rental Assistance

- Lease negotiation help
- First/last month rent or security deposits
- Area tours and neighborhood matching

Temporary Housing

- Fully furnished short-term rentals (corporate housing, Airbnb, extended-stay hotels)
- Per diem or housing allowance during the transition period

Moving and Travel

Professional Moving Services

- Packing, transportation, and unpacking
- Temporary storage if needed
- Pet relocation support

₹ Travel and Settling Expenses

- Flights, mileage, and family transport
- Settling-in allowance (utilities, furnishings, groceries, etc.)
- Paid time off for relocation tasks

Budget Benchmarks

- Local moves: \$5K-\$10K
- National relocations: \$10K-\$20K
- Cross-border or international: \$20K-\$50K

Family and Lifestyle Support

Spousal Job Assistance

- Career coaching and local market insights
- Networking introductions and placement support
- Work permit guidance for crossborder moves

🗑 School Search and Support

- Public, private, or international school matching
- Enrollment navigation and application prep
- Tuition assistance for private education (if applicable)
- Support for special education needs

Professional and Cultural Integration

6 Cultural Orientation

- Local customs, etiquette, and norms
- Language classes for executives and families
- Community engagement through expat networks or local associations

Professional Onboarding

- Executive coaching and 90-day planning (typically \$15K-\$30K)
- Mentorship pairing within the organization
- Networking introductions to local industry leaders
- Workplace training (compliance, ethics, and cultural fluency)





Relocating executives between the U.S. and Canada brings unique legal, tax, and logistical challenges. Companies must navigate complex systems while keeping the candidate experience seamless.

Immigration and Visa Requirements

Relocating to the U.S.

Common executive visa options:

- TN Visa For Canadian or Mexican professionals under USMCA
- L-1 Visa Intra-company transfers
- H-1B For specialized roles
- O-1 For individuals with extraordinary ability

Key steps:

- Hire an experienced immigration attorney early
- Understand processing timelines and document needs
- Ensure compliance with U.S. labor law and visa-specific restrictions

■ Relocating to Canada

Primary work permit pathways:

- Intra-Company Transfer (ICT) For multinational executives
- LMIA Confirms no displacement of Canadian workers
- C11 Visa For executives investing in Canadian businesses
- NAFTA/USMCA Work Permit Equivalent to U.S. TN for Americans and Mexicans

Key steps:

- Align work permits with planned start dates
- Confirm eligibility based on the role and executive background
- Understand provincial and federal compliance expectations

Tax and Payroll Complexities

Dual Taxation & Equalization

Executives may owe taxes in both countries unless protected by a treaty. To reduce impact:

- Implement tax equalization programs
- Provide access to cross-border tax advisors
- Adjust payroll to match residency and local tax codes

Payroll Logistics

- Align currency conversions for compensation
- Set up contributions for local benefits and pension plans
- Handle healthcare enrollment and insurance continuity

Cost of Living and Regional Disparities

Not All Moves Are Equal

- California and Quebec have high income tax rates
- Alberta and Texas are tax-friendlier
- Housing costs vary dramatically (e.g., NYC vs. Calgary)

Best practice: provide cost-of-living calculators and area comparisons early in the process so executives understand the full financial picture.



PERSPECTIVE

From the Executive's Perspective

Relocating isn't just a career move. It's a family decision, a lifestyle shift, and a leap into the unknown. Understanding what executives experience helps companies offer better support — and reduce the risk of failure.

What Relocating Leaders Care About Most

Executives want to know three things:

- 1. Is this worth the move? (Compensation, growth, and family benefits)
- 2. Will I be supported? (Logistics, housing, cultural adaptation, spousal career)
- 3. What happens if this doesn't work out? (Exit plan, severance, role clarity)

Get these answers right, and you'll win their trust — and likely, their commitment.



Personal Checklists and Timelines

0-3 Months Before the Move:

- Work remotely or commute temporarily:
- Finalize visa/work permit
- Secure short-term housing near the office
- Begin family planning (schools, spouse job search)

1 Month Before the Move:

- Start packing
- Coordinate moving services
- Set up utilities, insurance, banking, and mobile service

Move-In Week:

- Establish routine and start in-office onboarding
- Settle into housing and community
- Arrange childcare or school transportation

3-6 Months Post-Move:

- Finalize long-term housing
- Complete cultural integration
- Evaluate the transition and adjust expectations as needed



Adaptation, Integration, and Retention

Culture Shock is Real — Even Across close Borders

Executives relocating between Canada and the U.S. still face meaningful shifts in workplace norms, social expectations, and leadership styles.

Topic	U.S.	Canada
Leadership	Fast-paced, top-down	Collaborative, consensus-driven
Communication	Direct and assertive	Polite and diplomatic
Work-Life Balance	Rewarded for long hours	Stronger vacation culture
Diversity	Company-led initiatives	Systemic multiculturalism
Risk Appetite	High	Moderate

Helping executives understand and navigate these differences sets them up for faster integration — and improves retention.



Clear, up-to-date data helps align expectations — and build trust — during the relocation process. Use these benchmarks to inform offer structures, housing stipends, and cost-of-living adjustments.

Tax Rate Snapshots

U.S. Personal Income Tax - State Level (2024-2025)

- Highest: California (up to 13.3%), New York, New Jersey
- Lowest: Texas, Florida, Alaska (all with no state income tax)

Canada Provincial Income Tax (2024-2025)

- Highest: Quebec (up to 25.75%), Newfoundland, Nova Scotia
- Lowest: Alberta, Yukon, Nunavut (ranging from 4% to 11.5%)
- © Consider tax equalization programs when executives are relocating from a low-tax to a high-tax region.

Sales Tax Comparison

Top Combined Sales Tax Rates

- U.S.: California (7.25%), Tennessee, Rhode Island
- Canada: New Brunswick, Nova Scotia, PEI all at 15% HST

Lowest:

- U.S.: Alaska (no state sales tax)
- Canada: Alberta, Yukon, Nunavut 5% federal GST only

Housing Cost Benchmarks (Q1 2025 Estimates)

Rent: 1-Bedroom (Monthly USD)

Most Expensive:

Hawaii (\$2,500-\$3,500), California, New York

Least Expensive:

West Virginia (\$800-\$1,000), Mississippi, Arkansas

■ Rent: 1-Bedroom (Monthly CAD)

Most Expensive:

BC (\$2,400-\$3,000), Ontario

Least Expensive:

New Brunswick, Newfoundland (\$900-\$1,200)

Home Prices (Median)

Top 5:

Hawaii (\$850K-\$1M), California, Massachusetts

Bottom 5:

West Virginia (\$150K-\$180K), Mississippi, Oklahoma

Home Prices (Median CAD)

Top 5:

BC (\$1M-\$1.2M), Ontario, Quebec

Bottom 5:

New Brunswick (\$250K-\$300K), PEI, Saskatchewan

Key Takeaways

- Canadian cities like Vancouver and Toronto now rival or exceed U.S. coastal markets in cost.
- Lower-tax U.S. states may offer better net compensation but fewer social supports.
- Urban centers skew national averages; regional research matters.
- Remote work has inflated housing costs in smaller Canadian provinces.
- Canadian executive salaries are often lower than their U.S. equivalents.



CLOSING THOUGHTS



Relocation is more than a move - it's a message.

It tells your incoming executive whether you're invested in their success. It signals to your team that leadership transitions are handled with care. And it shapes the first impression that can define the next five years of performance.

The best relocations don't just get people to their new home — they get them excited to lead from day one.

What Great Looks Like:

- A plan that starts early
- Packages built for people, not just positions
- Cultural onboarding that doesn't end at orientation
- Support that makes the family feel considered, not forgotten
- Leaders who show up confident, focused, and ready to deliver

Why It Matters

Done well, relocation increases:

- Retention
- Time-to-productivity
- Internal trust and external reputation

Done poorly, it costs far more than the move.





About Ready Set Exec

We're not recruiters. We're growth enablers.

Ready Set Exec helps scaling organizations find senior leaders who drive real results. From C-Suite to high-impact departmental roles, we deliver not just candidates—but **confidence**. Founded by Patrick Shea and John Pezoulas, we've built teams, scaled companies, and helped over 10,000 people find roles they thrive in.

Visit <u>readysetexec.com</u> for more insights or follow us on LinkedIn. If you're planning a relocation or hiring from outside your region, let's talk.

