



Isle of Man Relocation

Helping professionals, families & businesses relocate with the smoothest of moves

Isle of Man Relocation Services

Relocation Options recognises that due to the significant number of benefits that island living provides, many successful people look to move themselves and their family to the Isle of Man to take advantage of these benefits. It is our aim to help professionals, families and businesses relocate to the Isle of Man with the smoothest of moves.

How Can We Assist with Your Relocation?

Financial Services

A major consideration when relocating to an offshore jurisdiction is your personal finances. Whether it is arranging a new mortgage, transferring ISA's or switching existing pension funds offshore there is a lot to consider. Our sister company, Financial Options is a firm of independent financial advisers who offer a wide range of services through experienced and fully qualified personnel that have a detailed understanding of these matters.

Financial Options will review your existing financial status free of charge and advise you accordingly on the best way to transfer your finances without any inconvenience to you.

- Mortgages - Our dedicated team offers a complete mortgage service and will find the best deal for you be it residential, buy-to-let or commercial. We can also advise on existing mortgages if required
- Investments - Through our team of investment consultants we can offer a complete review of existing portfolios, issue regular reviews and statements and take advantage of the various tax benefits available to Isle of Man residents

- Pensions - We can advise on all of the new pension vehicles now available on the island following the innovative changes to our pension legislation over recent years. From SIPPS to QROPS, we can provide the best option for you.
- Insurance - We offer a full review of your current protection portfolio whether personal or corporate and ensure it continues to meet your requirements or provide alternatives from the whole range of protection products available to match your new offshore status.

Ensuring your money works for you is essential and never more so when you move to a new tax jurisdiction, let our experts assist you in ensuring your financial relocation is as simple as possible.



Relocation Services

Here at Relocation Options, we appreciate that relocating to the Isle of Man is a major move for you and your family and we would like to offer you assistance at every step. The list of “to do’s” can seem endless, ranging from the most important – finding the right property to live in or work from, to others such as finding your nearest doctor and dentist or organising your broadband connection and utilities. We appreciate that the time incurred before and during the move can seem like a major upheaval. We have the local knowledge, availability and experience to make the move far more pleasant and save you considerable time and effort. We also are confident that our enthusiasm and diligence will be the ideal start to your new life here on the Isle of Man.

Your relocation assistance begins with a free initial consultation to ascertain your personal requirements. To assist us with this task, we have listed below our services offered – should you require any of these services please complete the last page and return to us. Once received we will forward a questionnaire to you in order to gain a working knowledge of your lifestyle requirements and also to tell us which local information you would require. To help you to decide the most practical relocation solutions for your own personal situation, we have listed below various options along with pricing information:

Moving In Assistance - £200

We offer assistance in the form of the following:

- Take meter readings on your property prior to you moving in and inform the relevant utility services
- Arrange with the utility services to change the services into your name by providing you with the correct paperwork to sign and then give it to the relevant authorities
- Book in an appointment for satellite services to be installed
- Book in an appointment for broadband and telephone services to be installed
- Arrange for a telephone book to be at your new home
- Inform you of the refuse collection day and ensure that you have a “wheelie bin” and if you are in a recycling area, that you have the correct information and crates for the recycling collections
- Give you the contact details for your local Commissioners office
- Provide a welcome box of essentials (we ask you to let us know which brands of you would prefer) including the Champagne!

Information on Local Services - £200 *(Or free with the Orientation Day Trip)*

We will source for you a directory of local services, doctors, dentists, and schools. We will specifically include information about facilities that are personal to you and your family such as gyms, schools, children’s groups (e.g. brownies/cubs) and sports facilities. This information will be supplied in the form of contact details with names (where relevant), email addresses and telephone numbers, so that you can progress these matters yourself. We will also be able to provide you with details about accommodation, car hire, utilities, including broadband and mobile phone service providers. Information with regards to people taking up residence in the Isle of Man will also be provided in respect of work permits, vehicle registration, driving licenses, medical/health services, property rates, voters list, immigration and employment.

Orientation Day Trip - £600 *(This includes research work prior to and including the day’s guide and also the additional information on Local Services as listed above)*

We will collect you from your chosen pick up point and give you a guided tour around the Island, pointing out the local landmarks along the way. At the beginning of the trip we will present you with a pack full of information on the Island for you to take home and study at your leisure. During this trip we will show you a few properties related to your specification, to give you an idea of the value of property in the Island in relation to specific areas. At the end of this trip you should have a clear idea of how you would like to proceed, for example where you might like to settle and what specific information, you might like to know. If you already have an idea of which areas you may like to look at specifically, let us know and we will focus our time on these areas.

Home Search for Rental Properties – £1,000 (Includes “Moving In Assistance” and “Information on Local Services”)

Once you have settled on an area or perhaps a couple of different towns that you would like to be near, we can start to look for suitable properties. For a rental search, we will speak to all of the local agents and private landlords, and then draw up an itinerary of viewing of suitable properties. We will arrange to collect you from your hotel or airport and accompany you to all of the viewings. Once you have made a decision, we will assist you with the rental negotiation and provide you with “Moving In Assistance” on the day you move in to your property.

Home Search for Purchase Properties – 0.5% of the Purchase Property capped at £5,000 (Includes “Moving In Assistance” and “Information on Local Services”)

This is where we will be your eyes and ears in local area. We will register with all the local agents and research the markets thoroughly on a weekly basis in search of your perfect home. We will preview suitable properties to save you from taking extra trips back and forth and should something be suitable we will arrange an accompanied viewing to the property. Once you have found the right property we will also assist you right up to the day you move into your new home and provide you with “Moving In Assistance” on moving day.

Commercial Search (Rental Properties) – Price on Application

Commercial Search (Purchase Properties) – Price on Application

The Next Stage

We would welcome the opportunity to assist you or your client with their relocation to the Isle of Man, please feel free to contact Lee or Michelle:

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www.financialoptions.co.im/isle_of_man_relocation.html

About Us

Relocation Options and Corporate Options are trading names of Corporate Options Limited and Financial Options is a trading name of Chase Financial Services Limited which are both registered in the Isle of Man and licensed by the Isle of Man Financial Supervision Commission. Chase Financial Services Limited is registered with the Insurance and Pensions Authority in respect of general business.

Relocation Options, Corporate Options and Financial Options are independently owned family businesses based in the Isle of Man and offer a comprehensive range of both domestic and international financial services including company formation, corporate management, Isle of Man relocation services, mortgage, investment and pension advice, life assurance, health protection, Isle of Man tax planning, savings advice and medical cover.





I/We require the Relocation Services you have described above and hereby inform you of the services I/We will require (please tick below boxes):

- Moving In Assistance**

- Information on Local Services**

- Orientation Day Trip**

- Home Search for Rental Properties**

- Home Search for Purchase Properties**

- Commercial Search (Rental Properties)**

- Commercial Search (Purchase Properties)**

Signed

Print Name(s)

Date

For and on behalf of Relocation Options

Date