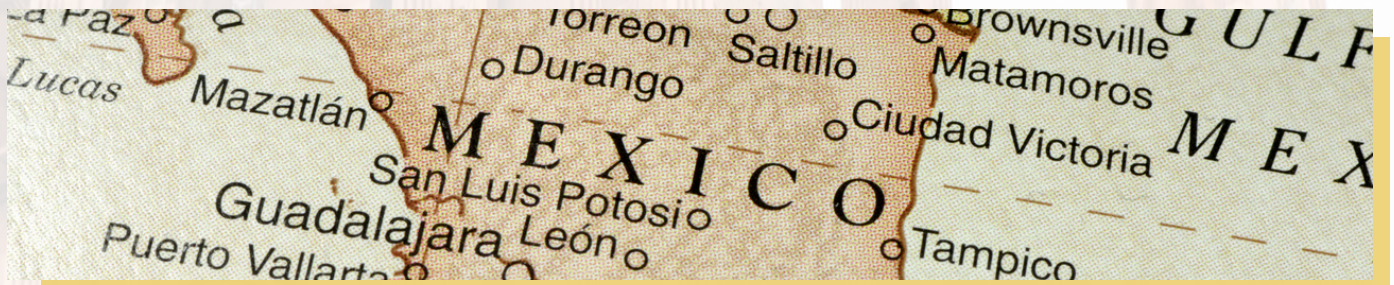


THE SAN MIGUEL STARTER GUIDE: EXPERIENCES, ESSENTIALS & YOUR RELOCATION PLANNING CHECKLIST





The Smart Way to Relocate to Mexico: Prepare, Plan, and Land Softly

Your Welcome Gift From Casa ELM

Seamless Relocation to San Miguel de Allende
Prepare Well. Move Confidently. Land Softly.

Thinking about moving to San Miguel de Allende?

What starts as excitement can quickly turn into overwhelm – visas, neighborhoods, healthcare, housing, and figuring out how daily life actually works once you arrive. Casa ELM Boutique Guesthouse was created to help you have a “Soft Landing” experience in Mexico with clarity and confidence – whether you’re exploring a vacation, temporary stay or planning a permanent move, we are here to help.

Founded by Michelle Wedderburn, who has lived in Mexico for over 8 years and traveled here for more than two decades, Casa ELM provides something online research cannot: real, boots-on-the-ground guidance and trusted local connections.

How We Help

Relocation Coaching – Personalized guidance so you can make informed decisions with confidence.

Half-Week Relocation Tours – Explore San Miguel beyond tourism with neighborhood tours, real estate insights, healthcare orientation, and local resources designed to save you time, money, and stress.

Cultural Experiences – Connect authentically with the community and experience the real rhythm of life in San Miguel.

Try Life in San Miguel Before You Commit

When you’re ready, you can experience daily living through our sister community, **Hacienda ELM**, offering 30-day+ co-living stays so you can truly “try on” life in Mexico before making long-term decisions.

Learn more: www.HaciendaELM.com

Relocating isn’t just about moving – it’s about transitioning into a new life with the right support.

Ready to begin? Book a consultation, tour or stay with us and start your journey with confidence.

Warm regards,

Michelle Wedderburn

Founder, Casa ELM Boutique Guesthouse &
Hacienda ELM | 50+ CoLiving Community

www.CasaELM.com | info@casaelm.com





Zacatecas City, MX

MUST SEE IN MEXICO



Mexico City



San Miguel de Allende



Oaxaca City



Tulum



Beaches in Mexico

My Favs:

Oaxacan Beaches, Mazatlan, Tulum



Churches in Mexico - All Cities





RECOMMENDATIONS OF THINGS TO DO FOR VISITORS AND NEWCOMERS TO SAN MIGUEL DE ALLENDE, GUANAJUATO, MEXICO

El Jardín

Located directly in the Center of Town.

Parroquia de San Miguel Arcángel

The centerpiece of this beautiful city. Located in front of El Jardín above
A must see!

Be sure to check out the inside as well.

Fábrica La Aurora

Hosts art galleries, cafes, and restaurants.

Instituto de Allende

Visual Arts School

The Biblioteca

Pública de San Miguel de Allende - Public Library

El Charco del Ingenio Botanical Garden

Natural Preserve close to El Centro.

Another Face of Mexico

La Otra Cara de México

Los Senderos Manaia

Beach in the Mountains

The Mayan Baths

Sanctuary of Thermal Waters

Zandunga

Musical venue with a full set menu, music, and dancing in a country setting.
A must do!

These Are Your First Steps Toward Relocating to San Miguel de Allende

You've started researching visas, paperwork, housing, healthcare, banking – and suddenly what felt exciting now feels like a lot.

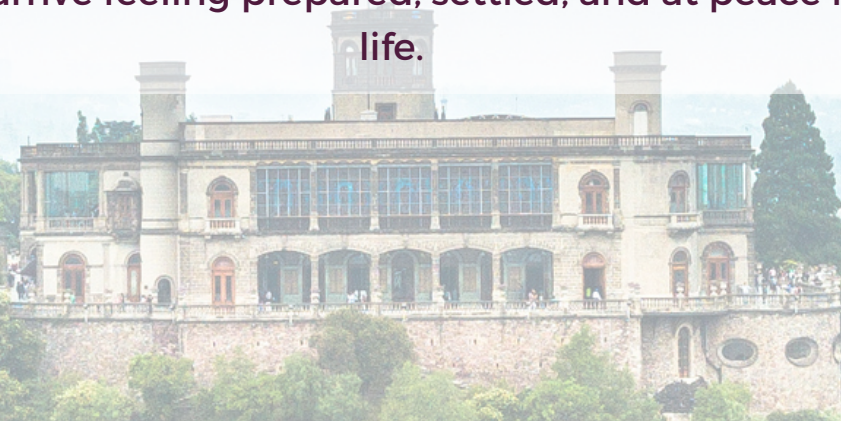
If that sounds familiar, you're not alone.

Relocating to another country isn't just about booking a flight. It's a process – and without a clear plan, small oversights can turn into expensive mistakes, unnecessary stress, or even trips back home to fix what was missed.

This step-by-step guide was created to help you move forward with clarity and confidence.

Instead of rushing everything at the last minute, you'll follow a structured timeline designed to spread decisions out over several months – so nothing important falls through the cracks.

Because the goal isn't just to move abroad. The goal is to arrive feeling prepared, settled, and at peace in your new life.



CHAPULTEPEC (MEXICO CITY)

The Most Common Relocation Mistakes – and How Thoughtful Preparation Helps You Avoid Them

Many people fall in love with San Miguel de Allende, but the difference between a stressful move and a smooth transition often comes down to having the right guidance.

Common challenges newcomers experience include:

- Treating the move like a vacation instead of preparing for real daily life
- Choosing housing too quickly without understanding neighborhoods
- Relying on online advice instead of current, local insight
- Underestimating timelines for paperwork and logistics
- Not planning for transition and setup costs
- Trying to navigate everything alone after arrival
- Making permanent decisions before truly experiencing life in San Miguel

This is exactly why Casa ELM Relocation Tours and Consultations exist.

Through personalized guidance, neighborhood exploration, and real boots-on-the-ground support, we help you understand how life in San Miguel actually works – saving you time, money, and unnecessary stress.

And when you're ready for hands-on experience, our sister community, Hacienda ELM, offers longer stays where you can live in community while receiving practical, real-time support as you adjust to life in Mexico.

Because the goal isn't just to move – it's to arrive prepared, supported, and confident in your decision.

Book a Relocation Strategy session by clicking this link:

<https://www.casaelm.com/relocationconsultations>

Book a ½ Week Relocation & Cultural Experience here:

<https://www.casaelm.com/events>

5 Experiences to Have Before Deciding to Move

These aren't tourist activities.

There are moments that reveal whether life in San Miguel truly fits you.

1. Live a Regular Weekday

Skip the weekend energy. Run errands, walk neighborhoods, sit in a café during normal hours. Real clarity comes from everyday life – not the highlight reel.

2. Step Outside Centro

Centro is beautiful, but it's only one version of San Miguel.

Where you live shapes your daily experience. Exploring different neighborhoods often changes how people imagine life here.

3. Notice the Community Energy

San Miguel is a gathering place for people starting new chapters.

Conversations linger, connections form naturally, and life moves at a more human pace.

4. Observe Daily Costs

Vacation spending and real living are different. Understanding everyday expenses – healthcare, transportation, utilities, and household support – helps prevent future stress.

5. Feel the Pace of Life

San Miguel reveals itself slowly. Walk more. Schedule less. Pay attention to how your relationship with time begins to shift.

A Truth Many Newcomers Discover

Moving abroad isn't about escape – it's about alignment. And alignment only happens through experience.

That's why Casa ELM exists: a soft-landing guesthouse where you can experience daily life before making permanent decisions. Or just visit as a traveler/guest exploring the city. We are a unique experience in San Miguel.

Many guests begin at Casa ELM and, when ready for a longer rhythm of living, continue their journey at Hacienda ELM, our co-living community offering 30+ day stays, private suites, shared experiences, and hands-on support while exploring life in Mexico – without rushing into long-term commitments.



YOUR INTERNATIONAL MOVE PLANNING CHECKLIST

BASIC PACKING MATERIALS

- | | |
|--------------------------|--------------------------------------|
| <input type="checkbox"/> | DOCUMENT FOLDERS |
| <input type="checkbox"/> | PORTABLE HARD DRIVES OR MEMORY CARDS |
| <input type="checkbox"/> | TRAVEL BAG OR BRIEFCASE |

PACKING YOURSELF?

- | | |
|--------------------------|------------------------------------|
| <input type="checkbox"/> | PACKING TAPE |
| <input type="checkbox"/> | BROWN PAPER |
| <input type="checkbox"/> | BUBBLE WRAP |
| <input type="checkbox"/> | MARKER PENS |
| <input type="checkbox"/> | BOXES OR CRATES OF DIFFERENT SIZES |

9 MONTHS BEFORE

- | | |
|--------------------------|---|
| <input type="checkbox"/> | BIRTH CERTIFICATES FOR EVERY FAMILY MEMBER |
| <input type="checkbox"/> | MARRIAGE CERTIFICATES |
| <input type="checkbox"/> | PASSPORT FOR YOU AND CHILDREN |
| <input type="checkbox"/> | PASSPORT FOR YOUR CHILDREN IF YOU ARE PLANNING TO TRAVEL WITH THEM |
| <input type="checkbox"/> | DRIVER'S LICENSE- INTERNATIONAL DRIVER'S LICENSE/ INTERNATIONAL DRIVER'S PERMIT |
| <input type="checkbox"/> | IF HAVING CUSTODY ISSUES, GET CHILD CUSTODY PAPERS |
| <input type="checkbox"/> | DIVORCE PAPERS AND RECORDS FROM ALL YOUR RELATIONSHIPS |
| <input type="checkbox"/> | VISA FOR YOU |
| <input type="checkbox"/> | VISA FOR YOUR CHILDREN IF YOU'RE PLANNING TO TRAVEL WITH THEM |
| <input type="checkbox"/> | WORK PERMIT |
| <input type="checkbox"/> | PERSONAL ID NUMBER - SOCIAL SECURITY NUMBER/TAX FILE NUMBER/NATIONAL INSURANCE NUMBER |
| <input type="checkbox"/> | BANK ACCOUNTS |
| <input type="checkbox"/> | HEALTH AND LIFE INSURANCE |

Schedule the perfect departure date minding things like seasons, public holidays and religious holidays. If you're moving as a tourist, travel when the weather of the new destination favors you.

9 MONTHS BEFORE

<input type="checkbox"/>	QUARANTINE YOUR PET
<input type="checkbox"/>	APPLY FOR A PET PASSPORT
<input type="checkbox"/>	GATHER ALL VACCINATION RECORDS
<input type="checkbox"/>	GET THE PERFECT CARRIER FOR THE PET (S)
<input type="checkbox"/>	BOOK A NEW HOME - IF YOU ARE PLANNING TO RENT A HOUSE, BOOK THE HOUSE EARLY.
<input type="checkbox"/>	ARRANGE SELLING OR RENTING THE OLD HOME BY CONTACTING THE SALES AGENCY
<input type="checkbox"/>	GET PROPERTY INSURANCE FOR YOUR HOME IN THE NEW DESTINATION
<input type="checkbox"/>	RESEARCH ON THE BEST MOVERS FOR YOUR HOUSEHOLDS AND VEHICLES AND MACHINERY
<input type="checkbox"/>	TRY LEARNING THE NEW LANGUAGE OF THE COUNTRY YOU ARE SHIFTING TO
<input type="checkbox"/>	CHANGE AND CHECK VOTING STATUS FROM YOUR OLD COUNTRY AND APPLY A NEW ONE IN YOUR NEW COUNTRY
<input type="checkbox"/>	APPLY FOR NO CLAIMS BONUS (NCB) RECORDS FOR YOUR VEHICLE
<input type="checkbox"/>	GET INFORMATION OF COMMUNICATION METHODS OF THE NEW COUNTRY
<input type="checkbox"/>	FIND OUT THE COSTS OF TALK TIME, SMS AND INTERNET
<input type="checkbox"/>	FIND OUT THE COSTS OF CALLING BACK HOME
<input type="checkbox"/>	APPLY FOR INTERNATIONAL CALLING SERVICES
<input type="checkbox"/>	NOTIFY YOUR GYM, THERAPY SESSIONS, YOGA SESSIONS OF YOUR LEAVING DATE
<input type="checkbox"/>	NOTIFY YOUR CHILDREN'S SCHOOL AND TUTORS OF YOUR LEAVING DATE

6 MONTHS BEFORE

<input type="checkbox"/>	OPEN A NEW BANK ACCOUNT FOR USE IN THE NEW COUNTRY
<input type="checkbox"/>	BUDGET FOR YOUR NEW LIFE
<input type="checkbox"/>	BUDGET FOR EXPENSES, I.E., VISA AND PASSPORT RENEWAL FEE
<input type="checkbox"/>	BUDGET FOR MOVING AND SETTLING IN EXPENSES
<input type="checkbox"/>	ALERT TAX AUTHORITIES ABOUT YOUR SHIFT

6 MONTHS BEFORE

<input type="checkbox"/>	REVIEW TAX OBLIGATIONS FROM YOUR OLD COUNTRY AND RESEARCH ON THE NEW ONES OF YOUR DESTINATION COUNTRY
<input type="checkbox"/>	WORK TO GET YOUR WORK PERMIT APPLICATION ALL SORTED OUT BY THE RELEVANT AGENCIES
<input type="checkbox"/>	APPLY FOR JOBS IF NOT YET EMPLOYED
<input type="checkbox"/>	CONTACT YOUR EXPAT AGENCY FOR INQUIRIES ON HOW TO GET JOBS
<input type="checkbox"/>	WORK ON YOUR WORK PERMIT IF YOU GET A JOB

3 MONTHS BEFORE

<input type="checkbox"/>	RESEARCH ON HEALTH CARE OPTIONS OF THE DESTINATION
<input type="checkbox"/>	BUY INTERNATIONAL PRIVATE MEDICAL INSURANCE
<input type="checkbox"/>	IF MOVING WITH MEDICATION, CONFIRM IF THEY ARE LEGAL IN YOUR NEW DESTINATION
<input type="checkbox"/>	CHECK THE AVAILABILITY OF YOUR MEDICATION IN THE NEW COUNTRY
<input type="checkbox"/>	GET DENTAL RECORDS AND DOSES FROM YOUR DOCTOR
<input type="checkbox"/>	GET ALL OTHER MEDICAL REPORTS AND DOSES FROM YOUR DOCTOR
<input type="checkbox"/>	GET ALL YOUR PET'S MEDICAL REPORTS, VACCINES, AND DOSES FROM YOUR VET
<input type="checkbox"/>	BOOK YOUR FINAL DENTAL CHECK-UP
<input type="checkbox"/>	BOOK YOUR FINAL MEDICAL CHECK-UP
<input type="checkbox"/>	BOOK YOUR PET'S FINAL MEDICAL CHECK-UP
<input type="checkbox"/>	HAND IN YOUR RESIGNATION (IF STILL WORKING)
<input type="checkbox"/>	SORT OUT YOUR BELONGINGS - WHAT TO CARRY, WHAT TO SELL, WHAT TO DISPOSE, ETC
<input type="checkbox"/>	PLAN A PRE-VISIT TO THE NEW COUNTRY
<input type="checkbox"/>	RESEARCH ON THE ITEMS YOU ARE NOT ALLOWED TO SHIP IN YOUR NEW COUNTRY
<input type="checkbox"/>	RESEARCH ON THE COSTS YOU WILL INCUR TO SHIP YOUR VEHICLES
<input type="checkbox"/>	PAY ALL OUTSTANDING FEES
<input type="checkbox"/>	ARRANGE THE BEST DATE FOR YOUR WATER TO BE DISCONNECTED
<input type="checkbox"/>	ARRANGE THE BEST DATE FOR YOUR INTERNET TO BE DISCONNECTED
<input type="checkbox"/>	ARRANGE FOR THE BEST DATE FOR YOUR TELEPHONE TO BE DISCONNECTED
<input type="checkbox"/>	ARRANGE FOR A DAY FOR YOUR TV SUBSCRIPTIONS TO BE DISCONNECTED
<input type="checkbox"/>	ARRANGE FOR A DAY TO CANCEL ALL YOUR GYM OR YOGA SESSIONS

2 MONTHS BEFORE

<input type="checkbox"/>	SET UP WAYS TO REDIRECT YOUR POST TO THE NEW DESTINATION
<input type="checkbox"/>	SET UP SCHOOL (IF YOU'RE MOVING WITH CHILDREN) - GET A SCHOOL THAT CATERS FOR THE NEEDS OF BLACK KIDS.
<input type="checkbox"/>	RESEARCH, CHOOSE AND CONTACT THE INTERNATIONAL REMOVAL COMPANY
<input type="checkbox"/>	IF MOVING BY YOURSELF, THINK ABOUT THE BEST STORAGE METHODS
<input type="checkbox"/>	FLIGHTS -BOOK YOUR FLIGHTS
<input type="checkbox"/>	CHECK ON YOUR APPLIANCES
<input type="checkbox"/>	IDENTIFY AND CONTACT AN EXPAT AGENCY IN THE NEW AREA FOR NETWORKING AND SUPPORT
<input type="checkbox"/>	CALL YOUR INSURANCE AND REMIND THEM OF YOUR LEAVING DATE
<input type="checkbox"/>	CALL YOUR CREDIT COMPANIES AND REMIND THEM OF YOUR LEAVING DATE
<input type="checkbox"/>	REACH OUT TO YOUR ELECTORAL REGISTRAR AND INFORM THEM OF YOUR DEPARTURE
<input type="checkbox"/>	INFORM YOUR CHILDREN'S SCHOOL OF YOUR LEAVING DATE AND CLEAR ALL OUTSTANDING BILLS
<input type="checkbox"/>	CONFIRM ALL OTHER OUTSTANDING BILLS AND FEES ARE PAID UP
<input type="checkbox"/>	ARRANGE WHO TO INFORM OF YOUR DEPARTURE
<input type="checkbox"/>	CONFIRM IF YOUR MOVING COMPANIES ARE READY FOR YOUR MOVE

1 MONTH BEFORE

<input type="checkbox"/>	CALL SERVICE PROVIDERS AND DISCONNECT ALL SUBSCRIPTIONS
<input type="checkbox"/>	CALL INSURANCE PROVIDERS AND CANCEL ALL YOUR POLICIES
<input type="checkbox"/>	CANCEL ALL YOUR DELIVERIES
<input type="checkbox"/>	CALL AND MEET UP WITH YOUR BANK TO: <input type="checkbox"/> FIND OUT IF YOU CAN MOVE TO ANOTHER BANK <input type="checkbox"/> FIND OUT IF THEY OFFER THEIR SERVICES IN YOUR NEW DESTINATION COUNTRY
<input type="checkbox"/>	REQUEST YOU NO CLAIM BONUS RECORDS AND FORMS
<input type="checkbox"/>	VISIT YOUR LAST MEDICAL APPOINTMENT AND CANCEL FURTHER SESSIONS
<input type="checkbox"/>	SEND NEW CONTACT INFORMATION TO FAMILY AND FRIENDS
<input type="checkbox"/>	ENSURE THAT YOUR BANK HAS MANAGED TO SET UP YOUR TRANSFERS
<input type="checkbox"/>	VISIT YOUR VET FOR THE LAST CHECK-UP



1 WEEK BEFORE

<input type="checkbox"/>	HAVE HARD CASH ON YOU AND ESPECIALLY FOREIGN CURRENCY
<input type="checkbox"/>	REACH OUT TO ALL YOUR CARD COMPANIES TO REMIND THEM OF YOUR DEPARTURE
<input type="checkbox"/>	CONFIRM YOUR FLIGHT SCHEDULE
<input type="checkbox"/>	PACK, SEAL, AND LABEL ALL THE BOXES CONTAINING THE THINGS YOU WILL SHIP ABROAD
<input type="checkbox"/>	SAVE ALL SOFT COPY FILES APPROPRIATELY AND BOX THE MACHINERY
<input type="checkbox"/>	RE-CHECK THE PROGRESS OF YOUR HOUSEHOLD SHIFTING FROM YOUR INTERNATIONAL MOVERS
<input type="checkbox"/>	PACK AND RE-CHECK YOUR TRAVEL DOCUMENTS INTO ONE PORTABLE BAG
<input type="checkbox"/>	RE-CHECK ON YOUR LIVING CONDITIONS IN YOUR NEW DESTINATION
<input type="checkbox"/>	IF YOU'RE RENTING YOUR OLD HOME, NOTIFY THE NEW TENANTS OR THE AGENT IN CHARGE
<input type="checkbox"/>	IF YOU'RE SELLING YOUR NEW HOME, CHECK ON THE NEW OWNERS AND NOTIFY THEM OF YOUR LEAVING
<input type="checkbox"/>	THROW OUT ALL THE OLD OR TATTERED THINGS YOU MIGHT NOT NEED LIKE TOYS, CLOTHES AND SHOES
<input type="checkbox"/>	SORT AND SELECT OUT THE CLOTHES THAT WILL BE GIVEN TO THE LESS FORTUNATE
<input type="checkbox"/>	SORT AND SELECT ALL THE ANTIQUES AND ORNAMENTS THAT YOU WILL GIVE OUT TO CHARITY
<input type="checkbox"/>	POT YOUR INDOOR PLANTS AND CHOOSE THE NEXT CAREGIVER FOR THEM
<input type="checkbox"/>	CLEAN ALL THE BEDDINGS AND THE CLOTHES THAT YOU WILL TAKE WITH YOU AND PACK THEM
<input type="checkbox"/>	CELEBRATE ON YOUR MOVE WITH FAMILY AND FRIENDS
<input type="checkbox"/>	DEAL WITH PENDING TASKS

PACK THE FOLLOWING FOR MOVING DAY

<input type="checkbox"/>	TOYS, GAMES, PUZZLES FOR CHILDREN (IF YOU ARE TRAVELING WITH THEM)	<input type="checkbox"/>	PHOTOS
<input type="checkbox"/>	PERSONAL VALUABLES	<input type="checkbox"/>	DECORATION AND ANTIQUES
<input type="checkbox"/>	MEDICATION	<input type="checkbox"/>	VISA
<input type="checkbox"/>	EXTRA UNDERWEAR	<input type="checkbox"/>	BOARDING PASSES
<input type="checkbox"/>	PHONE	<input type="checkbox"/>	FOREIGN CURRENCY
<input type="checkbox"/>	EARPHONES	<input type="checkbox"/>	PASSPORTS
<input type="checkbox"/>	CHARGER CORDS	<input type="checkbox"/>	TICKETS
<input type="checkbox"/>	SNACKS		



DEPARTURE DAY

<input type="checkbox"/> CALL INTERNATIONAL MOVERS & CONFIRM DELIVERY	
<input type="checkbox"/> UNLOCK NEW MOBILE PHONE	<input type="checkbox"/> JEWELRY IN YOUR CARRY-ON
<input type="checkbox"/> PASSPORT	<input type="checkbox"/> MEDICATIONS
<input type="checkbox"/> PRINT BOARDING PASSES	<input type="checkbox"/> VISAS
<input type="checkbox"/> TURN IN KEYS/HAND OVER HOME	<input type="checkbox"/> CASH - FOREIGN CURRENCY
<input type="checkbox"/> CHECK WHETHER YOU HAVE YOUR JEWELRY	

GOOD BYE TO FAMILY & FRIENDS AND OFF YOU GO!

If planning your move once felt uncertain, we hope this checklist has helped you take your first steps with greater clarity and confidence.

Visit www.CasaELM.com to book your experience today!
Let us help you curate your future.

CHICHÉN ITZÁ (THE FAMOUS MAYAN RUINS) NEAR CANCÚN

