

THE RELOCATION CHECKLIST

Every step of the move to Costa Rica, in the order you will actually need it, from the first scouting trip to your first ninety days. Written by someone who did it and lives in Playas del Coco.

THE SHORT VERSION

If you read nothing else, read these. Everything after this page is the detail underneath them.

- 01 **Visit in the green season.** Anyone can love this place in February. September tells you the truth.
- 02 **Rent for a year before you buy.** This is the single most expensive rule to break, and almost everyone breaks it.
- 03 **Pick the visa your paperwork supports.** Not the one that sounds most impressive. The card is identical at the end.
- 04 **Hire a Costa Rican lawyer.** Not a consultant, not a forum. Ask expats for names before you search.
- 05 **Ship almost nothing.** Bring what is irreplaceable. Buy the rest here and thank yourself.
- 06 **Budget for the car.** Import duty makes vehicles the line item that blindsides Americans.
- 07 **Ask about water.** Boring, unglamorous, and the diligence people most often skip.
- 08 **Learn some Spanish now.** The cheapest upgrade available to your life here, and it compounds.
- 09 **Build in slack.** Things take longer. That is not a fault to be fixed, it is the climate.
- 10 **Give it six months.** The first two are not representative of anything.

★ EXPAT IN PARADISE



01

BEFORE YOU COMMIT

THE CHEAPEST STAGE TO CHANGE YOUR MIND

Everything here costs you a plane ticket. Everything after it costs a great deal more, so this is the stage to be slow and honest.

01

THE CHEAPEST STAGE TO CHANGE YOUR MIND

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Visit in the green season, not just the dry one. September or October shows you the real place.

Rent an ordinary apartment for two or three weeks. Not a resort, not a hotel.

Do the boring things: a supermarket shop, a bank visit, a pharmacy run, a drive at night in the rain.

Spend time in at least two towns. They differ more than they look on a map.

Ask three residents what they would change about living here, then listen to the whole answer.

If you are looking at Guanacaste, come in March or April too. That is the region at its hardest.

Drive the road to any house you are considering, ideally when it is wet.

Work out honestly whether you loved the place or loved the holiday.

Deciding on the strength of one good week. A resort in February and a life in October are different countries. The people who go home inside two years are almost always the ones who only ever met the first one.

YOUR NOTES



02

TWELVE TO SIX MONTHS OUT

DECISIONS AND DOCUMENTS

The paperwork clock is slower than you think and it does not start until you start it. This is the stage that quietly determines whether your move runs to plan.

02 TWELVE TO SIX MONTHS OUT

DECISIONS AND DOCUMENTS

- ☐ Choose a residency category based on the shape of your income, not the size of it.
- ☐ Hire a Costa Rican immigration lawyer. Ask expats for names before you search for one.
- ☐ Order your documents and get them apostilled. Ask your lawyer for the right order.
- ☐ Do not order the FBI background check too early. It has a shelf life and people pay twice.
- ☐ Talk to an accountant who handles American expats, before your first filing season.
- ☐ Build a budget for the move itself, separate from your monthly cost of living.
- ☐ Work out what your health cover looks like in the gap before residency and the Caja.
- ☐ Start learning Spanish. Any amount, starting now.
- ☐ Tell the people who need a year of notice. Family first.

★ SEQUENCE MATTERS MORE THAN SPEED

Documents expire at different rates, so ordering everything at once is how you end up paying for the same background check twice. Your lawyer knows the order. Ask for it in writing and work backwards from your filing date.

YOUR NOTES



03

SIX TO THREE MONTHS OUT

MOSTLY DECIDING WHAT NOT TO BRING

The logistics stage. The instinct is to bring your life with you, and nearly all of the good decisions here are subtractions.

03 SIX TO THREE MONTHS OUT

MOSTLY DECIDING WHAT NOT TO BRING

- ☐ File the residency application. Expect it to go quiet at some point, which is normal.
- ☐ Decide what ships and what does not. For most people the honest answer is almost nothing.
- ☐ Price a container against simply replacing things here, including import duty.
- ☐ Sell, store or give away the rest. Start earlier than feels necessary.
- ☐ Book the pets: health certificate from a USDA accredited vet, current rabies, airline confirmed.
- ☐ Check airline temperature embargoes for pets. A Guanacaste arrival in April needs planning.
- ☐ Check every card for foreign transaction fees and leave the ones that charge them behind.
- ☐ Do the same for your debit card and its ATM fees.
- ☐ Tell your bank you are moving so nobody freezes your card in week one.
- ☐ Decide what happens to your US address, and set up mail forwarding.

★ WHAT THE CLIMATE DOES TO YOUR THINGS

Humidity is unkind to leather, paper, upholstery and anything stored in a sealed dark cupboard. Books wave and spot. American sofas hold damp. Locally made wood and rattan is built for this and costs less than shipping the thing you already own.

YOUR NOTES



04

THE LAST MONTH

SHORT, SHARP, MOSTLY ADMIN

Nothing clever here. Just the list of things that ruin the first week if you skip them.

04 THE LAST MONTH

SHORT, SHARP, MOSTLY ADMIN

- ☐ Book somewhere to land for the first month or two. Do not sign a year lease from abroad.
- ☐ Arrange the airport pickup, or a rental car with the all-in insurance price confirmed in writing.
- ☐ Copy and back up every important document, digitally and on paper.
- ☐ Fill prescriptions and carry them in labelled packaging with a copy of the prescription.
- ☐ Cancel what you are actually cancelling: utilities, gym, subscriptions, insurance.
- ☐ Confirm the pet paperwork is inside its validity window for your travel date.
- ☐ Put a little cash in your pocket for the other side.
- ☐ Say the goodbyes properly. This is not admin and people underestimate it.

★ THE ONE PEOPLE FORGET

Proof of onward travel. Airlines check it before you board far more often than immigration checks it on arrival, and being turned away at your departure gate is a spectacularly bad start.

YOUR NOTES



05

YOUR FIRST 90 DAYS

LANDING WELL BEATS LANDING FAST

You have arrived. The temptation is to sprint at settling in. Resist it, and spend the momentum on people rather than possessions.

05 YOUR FIRST 90 DAYS

LANDING WELL BEATS LANDING FAST

- ☐ Rent. Do not buy. Give yourself a year in the town before committing money to it.
- ☐ Get a local SIM and a local payment app in the first week.
- ☐ Find your people. A town with year round residents makes this far easier.
- ☐ Work out transport honestly: whether you need a car, and whether you need clearance.
- ☐ Register with the Caja once residency comes through. Compulsory, and the good news.
- ☐ Find a doctor, a dentist and a vet before you urgently need one.
- ☐ Learn the rhythm. What opens when, which day the feria runs, when the rain arrives.
- ☐ Keep going with the Spanish, now surrounded by it.
- ☐ Say yes to things for the first three months, even the ones you would decline at home.
- ☐ Give yourself six months before deciding how you feel.

★ THE REAL WORK OF THE FIRST YEAR

Not the paperwork. The unlearning. That being busy is the same as being useful, that a delay is an insult, that you should be reachable at all hours. Costa Rica does not argue with any of it. It simply declines to participate, and eventually you stop too.

YOUR NOTES

THE WHOLE THING, AT A GLANCE

Rough shape of a move that goes well. Yours will slip somewhere, and that is fine, because you can live here legally on a tourist stamp the whole way through.

12 MONTHS OUT	Scouting trips. Decide the region, not yet the street.
9 MONTHS OUT	Pick a residency category. Hire the lawyer.
6 MONTHS OUT	Documents ordered, apostilled, filed. The clock starts.
4 MONTHS OUT	Ship or sell. Book the pets. Sort the money.
1 MONTH OUT	Landing spot booked. Cancellations done. Goodbyes said.
MOVE	Arrive on a tourist stamp. Residency continues in the background.
FIRST 90 DAYS	Rent, meet people, learn the rhythm. Do not buy anything.
8 TO 18 MONTHS	Residency approved. Enrol in the Caja. Swap the licence.
YEAR THREE	Eligible to apply for permanent residency.

BRING IT OR LEAVE IT

WORTH THE SUITCASE

- ★ Prescription medication, labelled, with the prescription
- ★ Laptops and electronics
- ★ Good knives and one or two real kitchen pieces
- ★ Specialist hobby gear: dive kit, cameras, tools, tackle
- ★ Apostilled documents, in a folder, in your hand luggage
- ★ Quick dry clothing, less of it than you think
- ★ The pets

LEAVE IT BEHIND

- ★ Most of your furniture, especially anything upholstered
- ★ The car. Import duty rarely makes it worth it
- ★ Winter everything
- ★ Books in bulk. Humidity will find them
- ★ Most of your toiletries
- ★ Expensive jewellery and status objects
- ★ The expectation that everything works the way it did

WHO THRIVES, WHO GOES HOME

Not a judgement, and not about money. After watching a lot of arrivals, this is the split that actually predicts it.

TENDS TO STAY

- ★ People who can be delayed without being diminished
- ★ People who came for the place, not the discount
- ★ People who learn some Spanish
- ★ People who make at least a few Tico friends in year one
- ★ People who rented first
- ★ People who visited in the wet half of the year

TENDS TO LEAVE

- ★ People who need things to run on time
- ★ People whose main reason was saving money
- ★ People who cannot bear heat and chose the coast anyway
- ★ People with close family ties they had not thought hard about
- ★ People who wanted a permanent holiday
- ★ People who bought a house in month two

STILL HAVE QUESTIONS?

Of course you do. A checklist can give you the order. It cannot tell you which lawyer answers the phone, which road floods in October, or whether the town you are looking at suits the life you actually want.

That is what the call is for. Forty five minutes on video, your situation, straight answers, and a written recap afterwards with the follow-ups and the names of people worth calling.

[EXPATINPARADISE.COM/ASK-AN-EXPAT](https://expat.in.paradise.com/ask-an-expat)

General guidance from one expat, not legal, tax or immigration advice. Rules change. Confirm anything that matters with a Costa Rican immigration lawyer and an accountant who handles American expats.