



Needs Assessment Form

Your answers to the questions in this profile will help your transition to California to be as harmonious as possible. Please take the time to answer all questions as fully as you can. Once you have completed all relevant sections please send it to the attention of your personal International Relocation Manager. Any questions? Please email us @ bayarearelocationservices@gmail.com.

TRANSFEEE PROFILE

Transferee Complete Name: _____

Date of Birth: _____ Nationality: _____

Home Country Address: _____

Postal Code: _____ City/State: _____

Country: _____ Phone (Home): _____

Phone (Mobile): _____ Phone (Work): _____

Fax: _____ E-mail: _____

Father's name: _____ Nationality: _____

Mother's name: _____ Nationality: _____

EMPLOYMENT DETAILS

Corporate Name: _____

Profession: _____

Locating from: _____ Locating to: _____

Office Address: _____

Duration of Assignment: _____ Effective Date: _____

Current Position: _____ New Position: _____

Expected Move Date: _____ Expected Orientation date: _____

FAMILY DATA

Spouse/Partner Name: _____

Date of Birth: _____ Nationality: _____

Passport #: _____ Expiration Date: _____

Father's name: _____ Nationality: _____



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Mother's name: _____ Nationality: _____

Children:

Name:	Age:	Gender:	Date of Birth:	Nationality:	Passport #:

Pet(s): Yes No

If yes, please specify type, number and size: _____

TRAVEL INFORMATION

ARRIVAL - FLIGHT INFORMATION:

Airport: _____ Departing from: _____

Airline: _____ Flight #: _____

Date of Arrival: _____ Time of Arrival: _____

Is airport pick up required? Yes No

TEMPORARY/ HOTEL ACCOMMODATIONS AT DESTINATION:

Name of Hotel: _____

Telephone: _____ Dates of Reservation: _____

Please let us to know if you need our recommendation and reservation provided: _____

AUTOMOBILE TRANSPORTATION NEEDS:

Do you intent to: Lease Purchase

Notes: _____

HOUSING DETAILS

Type: Apartment House Comments: _____

Style: Modern Old Comments: _____

of Bedrooms: _____ Maximum Commute Time: _____

Preferred Areas(if known): _____

FEATURES (IF AVAILABLE):

- Heat
- Air Conditioning
- Tennis Courts
- Pool
- Garden



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- Garage
- Security parking
- Balcony
- Carpeted living room
- Separate dining room
- Separate study room
- Cellars
- Furnished
- Unfurnished

Please list any questions or comments: _____

EMPHASIS REQUIRED IN ORIENTATION TOPICS

Please rank the topics bellow (1 = unimportant / 5 = very important):

- Local International School(s) 1 2 3 4 5
- Next to your office: 1 2 3 4 5
- Local Shopping Centers: 1 2 3 4 5
- Near public transportation: 1 2 3 4 5

ALLOWANCE

Maximum Authorized Monthly Allowance: _____

Do you intend to purchase a property? Y N

What type of home are you looking for?

Single Family Home, Townhouse, Condominium?

What is your budget for the home you intend or looking to buy? _____

What cities are you considering for housing? _____

If you do not have an allowance please give us your expectations about the property size _____

Including: Rent Condominium fees Property taxes

Lease will be in: Company's Name Transferee's Name

Required Period of: _____

Assignment date: _____

Please be aware that in California the landlords want to start the contract immediately after you choose one it. If you are on a Look & See trip and intend to move to California only after 1 or 2 months, the landlord will most likely not agree to wait until your arrival to rent the property. So, please discuss this with your Coordinator.

SCHOOLING - EDUCATION AND CHILD CARE DETAILS

CURRENT SCHOOLING

Please detail type of school that each child currently attends including whether it is a private or public school



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Name:	Age:	School Year Level:	Current Type of School:

Do any of your children have physical handicaps or learning disabilities which would require especial attention classes by the school: Yes No

If yes, please explain: _____

Do you have a preference for any particular style of education:

American British German French Other: _____

Will you require your children to go to school by bus: Yes No

HOBBIES AND INTEREST

Please tell us about your interests and hobbies so we can provide you with relevant information according to your needs.

Please tell us about your wife's hobbies and interests.

Your children:

Are there any hobbies, interests or activities that your family participate in which would influence where you live and why?

Are you interested in joining Clubs: Yes No



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Please indicate Club facilities you are interested in:

Additional Comments:
