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Just an ordinary day at the office



Then the phone rings . . .



... and now you have a expat!



OVERVIEW

- Corporate Considerations
- Pre-Assignment Issues
- On Assignment Issues
- Repatriation
- Sequential Assignments

.....and now you have a expat!

Corporate Considerations

- Catalogue the Skills and Capabilities Required
- Cost Justification
- Understand the Modern Expatriate
- Recruiting Process and Background Checks
- Assignment Negotiations
- Assignment Coordinator
- Document HR Policies, Procedures and Benefits – Create a Manual and Governance over the Program

The Modern Expatriate

The 80's Expat



The Modern Expat



Expatriate Comparison



- How much do I need to have a similar standard of living?
- Will my family be happy?
- Fairly naïve with respect to expatriate packages
- A successful assignment is good for all
- How much can I squeeze out of the company?
- Can I get the best of the best for my family?
- They have more competitive information than most HR Departments
- Planning next assignment/position

Pre-Assignment Issues

- Immigration Processes and Cost
- Visa/Work Permits/Vaccinations/Medicals
- Definition of Family
- Orientation/Family Impact Assessment
- Pre-Assignment/House Hunting Trip
 - Child Care
 - Real Estate Agent and Fees
- Salary, Hardship Allowance, Relocation Bonus and Timing of Payment

Pre-Assignment Issues (con't)

- Home Country Property – Sale or Rent
- Disposal of Automobile(s)
- Host Country Residence
 - Rent & Guidelines
 - Utilities
 - Vacancy
 - Appliance Issues/Voltage
 - Pets
- Relocation of Household Goods/Personal Effects –
Accompanying/Air/Surface
- Storage of Goods NOT Shipped
- Temporary Accommodations/Expenses Pre-arrival of
Goods

Pre-Assignment Issues (con't)

- Personal Property, Liability and Auto Insurance
- Host Country Support Services
- International Tax Issues
- Cultural/Language Training
- Family education Issues (Public/Private/High School/College)
- Spouse Employment Issues & Subsidy
- Process to Deal with Unusual Requests (Wine Collection, Autos, Pianos)

On-Assignment Issues

- Adjustments for Cost of Living and Housing
- Exchange Rate Applicability
- Payroll Administration (Split Pay, Pension, Benefits, SSI, Other deductions)
- Assistance with Establishing a Local Bank Account
- Goods & Service Differential (Host is more or less expensive)
- Tax Equalization, Stock Options, RSGs, Incentive Plans, other income
- Tax compliance (Host/Home), Partial/Full Year and After Return
- Tax Forms/Accounting, Penalties, Interest & Extensions

On-Assignment Issues (con't)

- Social Taxes, SSI, NHS, Local Benefits
- Continuation of Home Country Service Credits, Benefits, etc.
- Performance Review and Criteria
- Host Country Housing Purchase
- Cost and Setup of Utilities
- Company Purchase or Leased Car/Driver
- Driver License Requirements

On-Assignment Issues (con't)

- Holidays, Vacation, Home Leave and Expenses/Travel Guidelines for Dependents
- Host Country Educational Expenses (Tuition, Uniforms, Books, etc.)
- Spouse and Children Remaining in Home Country
- Emergency Leave (Funerals, House Fires, etc.)
- Life Threatening Events and Medical Evacuation
- Legal Services, Visa Renewal, Security Issues
- Entertainment Budget/Join Associations/Country Club etc.

Repatriation Issues

- Rules Dealing with Voluntary, Involuntary Without Cause or With Cause
- Counseling for Employee and Family
- Return Relocation Issues
 - Home Country Residence
 - Household Goods & Personal Effects
 - Shipping
 - Insurance Issues
- Temporary Housing/Living Issues
- Dependent Education/Integration Problems
- Mobility/Relocation Payments
- Localization – Requested by Employee, Corporation, Payroll Adjustments, Immigration Requirements, Tax Changes/Compliance, Continuity of Service

Sequential Assignments

GO BACK TO SLIDE 5

Summary

- Centralize the responsibility
- Expect the unexpected + a process to deal with it
- Seek qualified information
- Catalog everything and create governance over the process

Any Questions?

