CMN RESOURCE 04 | FRAMEWORK

Global Mobility Decision Framework

A practical working document for families evaluating residence, education, business access, career flexibility and long-term international optionality.

THE STARTING QUESTION

What are we actually trying to make possible for our family?

A visa, residence permit or investment route is a tool. The decision should begin with the life, business and family outcomes you want - then work backward toward the jurisdictions and pathways that can support them.

"The strongest mobility decisions are not built around the program being promoted most loudly. They are built around the family's real priorities, constraints and time horizon."

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1. Define the family objective

Global mobility can solve very different problems. Before comparing countries or programs, identify the outcome the family is trying to create. More than one objective may matter, but rank them.

- Long-term residence or a second residence option
- Education access for children
- Career flexibility for the principal applicant or spouse
- Business expansion, investment access or proximity to customers
- Family proximity or succession planning
- A contingency plan if circumstances change at home
- A future citizenship pathway, where appropriate
- Lifestyle, healthcare, safety or quality-of-life considerations

PRIORITY RANKING

Priority	Importance (1-5)	Desired timing	Non-negotiable?
Family residence			
Children / education			
Business / career			
Tax / financial coordination			
Long-term optionality			

02 Map the family, not just the applicant

- Who needs mobility rights now, and who may need them later?
- Are there children whose ages affect timing or eligibility?
- Will family members relocate together, separately or not at all?
- Does a spouse need independent work or business flexibility?
- Are elderly parents or other dependents part of the long-term plan?

A pathway can look attractive for one person and still create complications for the family as a whole.

COMPARE THE PATHWAYS

3. Evaluate the route across six dimensions

Once the objective is clear, compare pathways consistently. Do not let one attractive feature - speed, investment amount, tax treatment, real estate, or marketing - substitute for the whole decision.

Dimension	Questions to answer
Immigration fit	What status is granted? Who is included? What are the renewal, residence and long-term requirements?
Timing	What is the realistic sequence from preparation to filing, approval, relocation and later milestones?
Capital	What capital must be committed, invested, donated, spent or maintained? What remains at risk?
Family impact	How does the route affect children, spouse, schooling, work rights and physical presence?
Tax & structuring	When should cross-border tax, estate, corporate or wealth-planning advice be obtained?
Execution risk	Which parts depend on government processing, documentation, investment performance or third parties?

04 Build the professional team early

- Immigration counsel for eligibility, filing strategy and immigration consequences
- Tax adviser for pre-move and cross-border tax analysis
- Independent financial or investment adviser where investment decisions are involved
- Corporate, estate or family counsel when ownership, succession or structures may be affected
- Banking / transfer specialists where cross-border movement of funds requires planning

Mobility decisions often cross immigration, tax, legal, investment and family-planning questions. The right specialists should stay inside their respective lanes.

QUESTIONS TO BRING TO PROFESSIONALS

- What decision must be made before we take the next irreversible step?
- What could change if we wait six or twelve months?
- Which assumptions in our plan need independent verification?
- What documentation should we begin collecting now?
- What are the consequences if our preferred pathway takes longer than expected?

MAKE THE DECISION RESILIENT

5. Stress-test the plan

A good mobility strategy should still make sense when reality is less convenient than the presentation. Discuss the downside case before committing.

- What if government processing takes materially longer than expected?
- What if the family's preferred relocation date changes?
- What if a child's education timeline becomes the dominant constraint?
- What if tax advice changes the preferred timing or structure?
- What if the investment, property or business component underperforms?
- What if one spouse relocates and the other does not?
- What is Plan B if the preferred route becomes unavailable or less attractive?

6. Decide with a written scorecard

Use the table below after professional advice has clarified the facts. The score is not a substitute for advice; it simply forces the family to compare alternatives using the same priorities.

Criterion	Weight	Option A	Option B	Option C
Family fit				
Timing				
Education / career				
Capital commitment				
Tax / structuring fit				
Long-term optionality				
Execution complexity				
Overall confidence				

THE FINAL CHECK

- We can explain in one sentence why this pathway serves our family objective.
- We understand what is immigration advice, tax advice and investment advice - and who is responsible for each.
- We know the next three actions, who owns them and what documentation is required.
- We understand the principal risks and have discussed a fallback plan.
- We are making the decision because it fits our family - not because of urgency or sales pressure.