

Canadian Immigration Planning Worksheet

Start With the Bigger Picture

Every good strategy starts with understanding the resources you have, the circumstances you are working with, and what you want the road ahead to look like.

Immigration planning is no different. Before choosing a program or submitting an application, it helps to step back and consider where you are today, where you want to go, who is part of that plan, and how the decisions you make now may affect your options later.

This worksheet is designed to help you think through those questions and begin building a clearer picture of your Canadian immigration and settlement goals.

You do not need to know which immigration program is right for you before completing this worksheet. The purpose is to identify your goals, resources, priorities and questions - not to determine your own eligibility.

1. What Am I Trying to Achieve?

Start with the destination before deciding on the route.

What is my main Canadian immigration goal?

- | | |
|---|--|
| ☐ Visit Canada | ☐ Study in Canada |
| ☐ Work in Canada | ☐ Extend or maintain temporary status |
| ☐ Permanent residence | ☐ Family reunification |
| ☐ Start or operate a business | ☐ Address an immigration problem or refusal |
| ☐ Long-term settlement in Canada | ☐ I am not yet sure |
| ☐ Other: _____ | |

What would a successful outcome look like for me?

Where would I ideally like to be in:

1 year:

3 years:

5 years:

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2. Where Am I Starting From?

Current country of residence:

Current Canadian immigration status, if applicable:

Status/permit expiry date:

Applications currently in process:

Previous Canadian immigration applications:

Previous refusals or immigration concerns:

Important upcoming dates or deadlines:

Is there anything about my current immigration situation that makes my planning urgent?

Complete this worksheet privately. The online worksheet does not collect or store your answers. Keep your completed copy secure and share personal information only through an appropriate secure channel.

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3. What Do I Bring to My Immigration Plan?

Your education, work experience, language ability, finances, Canadian experience and other circumstances may shape the options worth exploring.

Highest level of education:

Field of study:

Current occupation:

Years/type of work experience:

Canadian work experience, if any:

Canadian education, if any:

Language test/results, if available:

Employer support, if any:

Financial resources available for my plan:

Other strengths/resources I think may be relevant:

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4. Do I Have Family or Important Connections in Canada?

Do I have family in Canada?

- ☐ Yes ☐ No
- ☐ Unsure who may be relevant

Where are they located?

Province/territory:

City/community:

Relationship to me:

Could this family connection be relevant to my immigration or settlement plans?

- ☐ Possibly ☐ No
- ☐ I need professional advice to understand this

Do I actually want this family connection to form part of my immigration or settlement strategy?

- ☐ Yes
- ☐ Maybe
- ☐ No - I prefer not to rely on or be associated with this person/family connection

What should my consultant know about this relationship or connection?

A family connection in Canada may be relevant in some immigration or settlement circumstances, but its significance depends on the particular program and facts. Having family in Canada does not automatically create an immigration pathway.

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5. Who Is Part of My Immigration Plan?

Who is part of my immigration plan?

- | | |
|--|---|
| ☐ Just me | ☐ Spouse/partner |
| ☐ Children | ☐ Other dependent family members |
| ☐ Family members may join later | |

My preferred outcome is:

- | | |
|---|--|
| ☐ We migrate together | ☐ I migrate first and my family follows |
| ☐ My spouse/partner migrates first | ☐ We may need to migrate in stages |
| ☐ We have not decided | ☐ Other: _____ |

If migration may happen in stages:

What factors do we need to consider?

- | | |
|---|--|
| ☐ Children's schooling | ☐ Spouse/partner's employment |
| ☐ Housing | ☐ Finances |
| ☐ Childcare | ☐ Immigration status for each family member |
| ☐ Timing of applications | ☐ Travel/separation |
| ☐ Other: _____ | |

How long are we prepared to live apart if our immigration plan requires different stages?

What would make staged migration difficult for our family?

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6. Where Do I Want to Live in Canada?

Preferred province/territory:

Preferred city/community:

Why have I chosen this location?

Would I consider living somewhere else in Canada if another location better supported my immigration, employment or family goals?

☐ Yes

☐ Maybe

☐ No

What factors are most important when choosing where to live?

☐ Employment

☐ Family

☐ Housing affordability

☐ Education

☐ Community

☐ Climate

☐ Transportation

☐ Immigration opportunities

☐ Lifestyle

☐ Other: _____

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7. Canada: Does It Fit My Longer-Term Plans?

Immigration planning is also settlement planning. Before making major decisions about studying, working or settling in Canada, consider how much you know about the country and whether your expectations are realistic.

Topic	Very little	Some	Well informed
Canadian climate and winters	☐	☐	☐
Cost of living	☐	☐	☐
Housing	☐	☐	☐
Employment and labour market	☐	☐	☐
Canadian economy	☐	☐	☐
Taxes	☐	☐	☐
Healthcare	☐	☐	☐
Education and schools	☐	☐	☐
Transportation	☐	☐	☐
Diversity and multiculturalism	☐	☐	☐
Canadian culture and social norms	☐	☐	☐
Province/city where I want to live	☐	☐	☐

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7. Canada: My Expectations and Research

Why have I chosen Canada?

Why have I chosen the province or city where I intend to live?

Have I researched the cost of living there?

☐ Yes

☐ Somewhat

☐ No

Have I researched employment opportunities in my occupation?

☐ Yes

☐ Somewhat

☐ No

What aspects of living in Canada concern me most?

What am I most looking forward to?

If permanent residence were not guaranteed, would my current plan to study, work or live temporarily in Canada still make sense for me and my family?

☐ Yes

☐ No

☐ Unsure - I need to think about this more

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8. What Decisions Am I Making Now?

- | | |
|---|---|
| ☐ Choosing a school/program | ☐ Choosing a province/city |
| ☐ Accepting/changing employment | ☐ Changing employers |
| ☐ Applying for a work permit | ☐ Applying for a study permit |
| ☐ Extending temporary status | ☐ Taking/re-taking a language test |
| ☐ Pursuing a provincial nomination | ☐ Preparing an Express Entry profile |
| ☐ Sponsoring/reuniting with family | ☐ Other: _____ |

Which decision feels most urgent?

9. How Could Today's Decisions Affect Tomorrow's Options?

An immigration decision can solve an immediate problem while creating - or limiting - future options. Consider the longer-term effect before deciding solely on what appears easiest today.

Could my current decision affect:

- | | |
|--|--|
| ☐ My ability to work | ☐ My ability to study |
| ☐ My immigration status | ☐ My permanent residence strategy |
| ☐ My spouse/partner | ☐ My children |
| ☐ Where I need to live | ☐ My finances |
| ☐ My career | ☐ I am unsure |

What questions do I need answered before making this decision?

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10. What Could Affect My Plan?

- | | |
|--|---|
| ☐ Expiring immigration status | ☐ Previous refusal |
| ☐ Language score | ☐ Education/credential limitations |
| ☐ Work experience | ☐ Employer dependency |
| ☐ Finances | ☐ Family obligations |
| ☐ Children's needs | ☐ Location/province |
| ☐ Time | ☐ Immigration-policy changes |
| ☐ Other: _____ | |

Which of these concerns me most?

11. What Is My Plan B?

Immigration programs and selection priorities can change. A strong strategy considers what you will do if the preferred pathway becomes unavailable, takes longer than expected or no longer fits your circumstances.

If my preferred immigration pathway is not available, what alternatives am I prepared to consider?

What am I NOT willing to change?

Examples may include:

family separation; province/location; career; education; finances; time.

At what point would I reconsider my current plan?

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12. My Next Three Actions

Action 1:

Target date:

Action 2:

Target date:

Action 3:

Target date:

The question I most need answered before moving forward is:

Build the Strategy Before You Build the Application

A successful immigration plan is not only about whether you can submit an application. It is about understanding where you are, where you want to go, who is coming with you, and whether the decisions you make today support the life you are trying to build.

Canadian immigration programs, selection priorities and intake levels can change. Strategic planning cannot guarantee an immigration outcome, but it can help you make more informed decisions, identify potential risks earlier and understand when your plan may need to change.

Need help developing your immigration strategy?

Book a Consultation

Taihisa Hill-Guye, RCIC

Founder & Managing Director

Tabula Rasa Immigration Services Inc.

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Canadian immigration policies and program requirements can change. This resource is a planning tool and provides general information only. It does not determine immigration eligibility or guarantee that a particular pathway is available. Individual circumstances may require professional advice, and current requirements should be verified against official Government of Canada information.

Strategic immigration planning starts with understanding where you are, where you want to go and what it may take to get there.

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