FREE RESOURCES

Migration Consultation Preparation Checklist

Make your consultation easier to follow.

GENERAL INFORMATION AND ORGANISATION TOOL

Edition 2.0 / 24 November 2026

Use this checklist to organise the questions and records you want to discuss with a qualified migration professional. It does not assess your circumstances or establish a client engagement.

Published by Okapi Migration Services

Blaise Itabelo
Registered Migration Agent / MARN 1571548

Start using your pack

Who this is for

People preparing for a migration consultation.

Included files

This printable PDF guide with instructions, prompts and blank record forms.

A simple working sequence

1. Save a private working copy before entering personal information.

2. Read the section instructions and the fictional example.

3. Enter your own facts and source references. Leave unknown values blank and explain them in Notes.

4. Use the open-question and review fields for human follow-up.

5. Save a dated version before sharing through an agreed secure channel.

File requirements

Use a PDF reader for this guide. XLSX files need a spreadsheet application that supports Excel workbooks. DOCX files need a compatible word processor. The editable files are not government forms. They contain no macros or automatic submission function.

Important limit

These are general information and organisation resources. They do not assess your eligibility, choose a visa pathway, assess prospects, decide whether evidence is sufficient, complete or submit a government form, review your documents or appoint Okapi as your migration agent. Personalised assistance is agreed separately.