SWAN Wealth Management, one of Canada's top cross-border advisory firms, releases video for Americans moving to Canada

New educational video addresses the critical steps affluent Americans should take to avoid the costly mistakes investors often make when moving to Canada

VANCOUVER, BC, CANADA, September 16, 2026 /EINPresswire.com/ -- SWAN Wealth Management, one of Canada's leading Canada-U.S. cross-border financial advisory firms, has released a new video guide to help Americans planning a move to Canada. The video, "EXACT Steps to Take If You're Moving from the USA to Canada," walks viewers through the financial and legal steps to take before crossing the border, highlighting one action almost everyone forgets.

> Most people moving to Canada think they just have a tax problem. They don't. Taxes are just one piece of the puzzle. You also need a plan for your investments, estate, and immigration status."
>
> *Tiffany Woodfield*

More Americans are considering a move to Canada, but the financial side is often more complicated than people expect. SWAN Wealth Management's latest educational video makes the case that a cross-border move is not just a tax problem. Instead, investors must consider their full financial picture — a cross-border move touches investments, estate planning, and immigration status all at once.

"Most people moving to Canada think they just have a tax problem. They don't," says Tiffany Woodfield, cross-border financial advisor and co-founder of SWAN Wealth Management. "Taxes are just one piece of the puzzle. You also need a plan for your investments, estate, and immigration status, and those pieces can't be solved in one meeting with an accountant."

The video outlines six steps SWAN recommends to anyone considering a move north, including:

Create your vision for the move: You don't need an exact move date. Anchor your timeline to a life event, such as retirement, your kids finishing school, or the gap before you qualify for Medicare.

Reframe the problem: A cross-border move is not just a tax problem. Taxes are one piece of a

plan that also covers your investments, estate, and immigration status.

Work with a cross-border financial advisor early: Start building your team two to three years before you move, while you're still a U.S. resident to make the most of valuable planning opportunities.

Review your investments and key financial events: Look at how your move date affects taxes on vesting stock, bonuses, or selling a business. If you own a U.S. limited liability company (LLC) or trust, check the Canadian tax rules that apply to it.

Look at your U.S. property: Holding U.S. real estate in a trust can create tax and reporting complications once you're a Canadian resident. Before you sell, map out the capital gains tax in both countries.

Start the immigration process early: Non-citizens should start the immigration process six to twelve months before their move, since it can take that long. Properly severing your state residential ties can also help you avoid owing state taxes after you leave.



Tiffany Woodfield, SWAN Wealth Management, Senior Wealth Advisor, Portfolio Manager, CRPC®, CIM®, TEP®

The video is designed to help high-net-worth Americans who are planning a move to Canada and need a coordinated plan for their investments, estate, and immigration timing before they relocate.

As one of the leading cross-border financial advisory firms, SWAN Wealth Management continues to guide U.S. and Canadian clients through the financial side of cross-border moves, helping families plan ahead instead of untangling problems after they arrive.

As part of its commitment to providing world-class education to Americans moving to Canada, SWAN Wealth Management has created a comprehensive video library, which you can view here: www.swanwealthcoaching.com/videos.

Videos provide general education and are not a substitute for personalized financial, tax or legal advice.

About SWAN Wealth Management

SWAN Wealth Management is a Canada-U.S. cross-border financial advisory and wealth management firm founded by Tiffany Woodfield and John Woodfield, operating through

Raymond James Ltd. The firm helps Americans, Canadians and green card holders moving across the Canada–U.S. border coordinate their investments, wealth management and estate planning for their country of residence. SWAN Wealth Management works with more than 190 cross-border clients across Canada and the United States and manages just under $500 million in assets. With clients in 21 states and 9 Canadian provinces, SWAN Wealth Management is one of Canada's leading cross-border advisory firms.

Learn more at https://www.swanwealthcoaching.com/about-swan-wealth

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