
Home Marketing Assistance:	Home marketing assistance through Focus' preferred broker network. Please do not speak with any real estate agent or list your home before speaking with your relocation counselor.
Lease Break Assistance:	Up to two month's rent, max \$3,000; excluding pet fees and incentive repayments
Household Goods Shipment:	Expenses related to packing, transporting and unloading of normal household furnishings and possessions from origin to destination with MLH's preferred service partner (max weight 25,000 pounds)
Auto Shipment:	One auto shipment if over 500 miles with MLH's preferred service partner
Household Goods Storage:	Up to 60 days of storage at either origin or destination through MLH's preferred service partner
Temporary Living:	Up to 60 days in furnished corporate apartment or hotel accommodations, including pet fees arranged by Focus. Associate should secure his/her own renter's insurance if a lease is signed.
Mortgage Assistance:	Three preferred national lenders with corporate rates, pre-approval available
House Hunting Trip:	1 trip; 3 days/2 nights for associate and spouse. Roundtrip transportation – economy airfare or mileage (per IRS guidelines); rental car, fuel, tolls and parking (if traveling by air); reasonable lodging and up to \$65 per day, per person for meals
Rental Assistance:	Up to 1 full day of paid rental assistance (max. \$800) with an agent to preview rental options, coordinated by Focus
Home Finding Assistance:	Home finding assistance through Focus' preferred broker network. Please do not speak with any real estate agent before speaking with your relocation counselor.
Report to Work Travel:	1 one-way trip; economy airfare or mileage (per IRS guidelines); up to \$65/per day for meals while traveling; rental car, fuel, tolls and parking if personal auto is in transit
Final Move Expenses:	One way transportation from origin to destination – economy airfare or mileage, tolls and parking for up to 2 vehicles (based on 400 miles per day); up to 5 nights lodging (less pet fees); up to \$65 per day, per person for meals; rental car, fuel, parking and tolls, if air travel
Miscellaneous Allowance:	Up to \$5,000 allowance, less taxes, for relocation expenses not outlined in this policy, receipts needed
Tax Implications:	All relocation related expenses, excluding the miscellaneous allowance, will be grossed up at the standard rate. A relocation tax report (RTR) will be provided at the beginning of the year.
Mileage:	Mileage rates based on IRS guidelines

Purpose:

Methodist Le Bonheur Healthcare's Relocation Program is designed to help minimize the uncertainty and challenges of relocating. Methodist Le Bonheur Healthcare (MLH) has partnered with Focus Relocation, Inc. (Focus) to assist in providing professional guidance, resources and service during the relocation process. The following is a detailed summary of MLH's relocation policy. MLH intends that these policies be continued indefinitely. However, they reserve the right to amend or terminate any policy and practice at any time.

Focus Services:

Upon initiation, your designated relocation counselor will coordinate every step of the relocation process while advocating on your behalf, beginning with the following:

- Assessing the relocation needs for you and your family
- Providing a detailed policy briefing of relocation benefits
- Introducing preferred service partners as needed (real estate agents, household goods van lines, temporary housing providers, etc.)
- Addressing questions regarding expense reports, policy interpretation, etc.

Associate Eligibility:

- Relocation benefits are for the associate moving at MLH's request and his/her spouse and dependent children.
- **Relocation benefits must be used within 1 year of your effective date of transfer and report date to your new location.**

Conflict of Interest:

Due to a conflict of interest, the relocating associate may not use a real estate agent, inspector, appraiser or contractor who is related to an MLH associate.

Repayment Agreement:

The Relocation Repayment Agreement must be signed and returned to your Human Resources contact **before** authorization into MLH's relocation program.

Expense Reimbursements:

To receive reimbursement of your relocation expenses as outlined in the guidelines, your relocation expenses must be submitted online at <https://focus.reloviewscomplete.com/MC> or via the mobile app. Your secure login and password information for the mobile app and online portal, along with directions, will be sent to you by your counselor.

Alternative methods for sending receipts:

1. Email receipts to: receipts@focusrelocation.com
2. Fax receipts to: 615-739-9379
3. By mail; contact your counselor for address

Guidelines for filing eligible expenses:

- Submit expenses for reimbursement within 7 days of incurring the expense
- Original receipts must be submitted for all mailed in expenses
- Incomplete expense reports will result in a delay in payment
- Itemize expenses in order of the date incurred

- **Relocation expenses are separate and distinct from other business-related activities and must be submitted through Focus' Move Coordinator portal or mobile app.**
- Any expenses that are adjusted or disallowed per the terms of these guidelines will be noted within the report by the expense analyst
- Keep a copy of your submitted expense reports and receipts for your records
- All relocation expense reimbursements must be submitted within 12 months of your start date

Real Estate Agent Selection:

MLH understands that getting the best price for your home is of utmost importance to you. Selection of a relocation trained agent is critical. Your counselor will provide you two preferred real estate companies and agents (one of your choice) available in your community. We recommend you interview **both agents** to compare their abilities to effectively market your home.

Please do not contact or make any arrangements with any real estate agent, until you have spoken with your counselor. MLH is using Focus Relocation's preferred broker network. Staying within the guidelines for **both selling and buying your home** will help to defray relocation costs for MLH.

Home Marketing Assistance:

One of the most important parts of your relocation is selling your present home. For this reason, MLH has arranged for home marketing assistance.

Your counselor will order a Broker's Market Analysis (BMA) from two (2) local real estate agents. The BMA's will provide initial information regarding your home along with suggestions for marketing. In addition, the agents will provide a recommended list price and expected sale price for your home. The results of the BMA will be reviewed by Focus and shared with you.

You are encouraged to list your home realistically, typically no more than 5% above the recommended list price noted on the BMA. Once listed, your counselor will monitor the listing effort. Your listing agent will communicate the results of advertising and open houses, as well as feedback from buyers and other real estate agents, to Focus.

Lease Break Assistance:

If it is necessary to break a lease at departure location, MLH will reimburse this expense up to two month's rent, not to exceed \$3,000, less pet fees and incentive repayments. To receive reimbursement of expenses, submit a relocation expense report and provide a copy of the fully executed lease and vacate statement from leasing firm, itemized statement of amount due and proof of payment.

Household Goods Shipment:

MLH covers one-time reasonable expenses related to packing, loading, transporting and unloading of normal household furnishing with preferred moving partner (must use to qualify for this benefit). Weight not to exceed 25,000 pounds.

Focus will coordinate professional moving services for the shipment of your household goods. Contact your counselor as soon as your moving date is determined to establish a preliminary schedule. It is recommended to have the survey performed early to ensure your desired move dates will be available. There are certain times of the year that van lines require a 4 to 6 week notice for move scheduling. Any questions should be directed to your counselor.

Neither the carrier nor MLH will accept responsibility for breakage of articles packed by the associate. It is recommended that van line personnel be allowed to pack all goods.

PLEASE NOTE: To avoid unnecessary delays and misunderstandings, the associate or spouse **MUST** be present to supervise the packing, loading and unloading of the household goods. This person should be prepared to carefully check the inventory sheets and note any damage or concerns. Do not sign the inventory sheet or release until all questions are resolved; this is critical for the billing and the claims process.

Shipment Guidelines (Crating and 3rd party services not to exceed \$2,000):

1. Services are to be coordinated during regular business hours, Monday - Friday
2. **Crating:** Some items may require crating; the van line will identify these items and crate them for shipping
3. **Appliances:** Third-party services covered for the disconnect and reconnect of the following:
 - a) Washer/dryer
 - b) Ice maker

The following items will be the responsibility of the associate to disassemble/reassemble, dismount/remount and disconnect/reconnect:

- a) Computers
- b) Stereo equipment
- c) Television
- d) Audio visual / theater equipment
- e) Light fixture/ceiling fans
- f) Waterbeds (including draining and filling)

Items not eligible for reimbursement for van line move may include, but not limited to:

1. Unpacking services (see debris pickup, which is provided)
2. Plastic Tubs/Bins
3. Hazardous materials such as explosives, chemicals, flammable materials, firearms, garden chemicals or firewood, lumber or building materials
4. Pets or livestock
5. Perishables such as plants, food or wine collections
6. Farm equipment, storage sheds, safes, large or cumbersome items
7. Trailers such as utility, horse, camping, recreational, etc.
8. Recreational/hobby equipment: Snowmobiles, jet skis, ATVs, airplanes, boats, swing-sets, wooden play structures, universal gyms, pool tables, pianos, trampolines, or other recreational/hobby type items
9. Removal, disassembly/reassembly, installation or shipment of satellite dishes, above ground pools, spas/hot tubs and water softeners, draperies, carpeting, etc.
10. Valuables or items of extraordinary value such as furs, jewelry, currency, artwork, grandfather clocks, stamps, baseball cards, taxidermy items, etc. Associate should carry items of value with them during the move. Any shipment with carrier for items of value is done at the associate's own risk
11. Maid service, driver or crew waiting time, tips or food for the moving crew, rubbish removal
12. Overtime charges (weekends, holiday and evening hours)
13. Additional stops, extra pickups or deliveries
14. Removal of lighting fixtures, drapery hardware
15. Charges for a personally rented trailer and/or truck, if shipping household goods via a van line

Additional services provided:

One time debris pick-up of packing materials within 60 days of delivery

Insurance coverage:

The van line provides valuation coverage of up to a certain amount. This is based upon the weight and will be reviewed with you by the driver. If the associate declares an overage value, additional insurance may be purchased at associate's expense.

Auto Shipment:

One auto shipment is eligible if moving over 500 miles. MLH will not cover costs related to autos moved via enclosed transport/ trailers, high-value autos or private collections.

Storage:

Up to 60 days of storage is eligible with the van line at origin or destination location only when household goods are moved before occupancy is available at the destination location.

Please note that you will not have access to your household goods while in storage.

**If associate elects to deliver household goods to self-storage, etc., the liability insurance with the van line is released at time of delivery. All claims for damages must be done at time of unloading to self-storage. The associate will be responsible for the costs moving out of the unit.

Temporary Living:

Your counselor will arrange up to 60 consecutive days in a fully furnished corporate apartment or hotel, including pet fees. **Associate should secure his/her own renter's insurance if a corporate apartment is secured.** MLH, Focus, the lessor and/or lessee will not be liable for any damage, loss, injury, etc. to person(s) and/or property.

Mortgage Assistance

Your counselor can put you in touch with three preferred national lenders. Comparing multiple lenders enables you to find and choose the loan product or program that best fits your financial needs. Working with one of these national lenders may allow preferred interest rates and pre-approval.

House Hunting Trips:

House hunting trips are for the purpose of the associate and spouse to visit the new location to find suitable housing.

Trip guidelines:

1. One trip, maximum of up to 3 days, 2 nights
2. Transportation: Economy airfare **or** round trip mileage for one car (per IRS guidelines) For airfare reimbursement, itemized airline itinerary showing to and from cities/dates & times/traveler(s) names (full itinerary from airline website) and proof of payment (if not shown on itinerary) required.
3. Up to \$65 per day, per person for meals (Itemized receipts with proof of payment needed)
4. Reasonable lodging – must provide itemized statement of room charges received at checkout
5. Standard rental car, fuel, tolls and parking (if traveling by air) Rental agency itemized final invoice showing date/time of pick up AND actual return required. Estimates are not acceptable.

Rental Assistance:

Your counselor will provide resources to help locate rental options. Please contact your counselor if you need rental agent assistance to aid in your search. MLH will provide up to 1 full day of assistance with a preferred rental agent up to \$800.

Home Finding Assistance:

Buying a home is an important part of making your relocation experience successful. The Home Purchase program provides valuable assistance in settling into your new location.

Your counselor will learn about your needs and wants in your new community. This insight will aid your counselor in selecting a Realtor with your profile in mind. **Please do not speak with any real estate agents until you have spoken with your counselor.**

MLH is using Focus's preferred Broker network. Using this home purchase benefit is critical while helping to defray relocation costs for MLH. Your counselor will place all agent referrals and coordinate any agent changes, if necessary.

Report to Work Travel:

MLH will reimburse all actual and reasonable expenses reporting to work. Itemized receipts are required for reimbursement.

1. Up to \$65 per day for meals while traveling (receipts with proof of payment needed)
2. Economy airfare or mileage (per IRS guidelines) For airfare reimbursement, itemized airline itinerary showing to and from cities/dates & times/traveler(s) names (full itinerary from airline website) and proof of payment (if not included in itinerary) required.
3. Rental car, if traveling by air, fuel, tolls and parking - Rental agency itemized final invoice showing date/time of pick up AND actual return required. Estimates are not acceptable.

Final Move:

MLH will reimburse all actual and reasonable expenses moving you and your family to the new location. Itemized receipts are required for reimbursement.

1. Up to \$65 per day, per person (5 days maximum) for meals (receipts with proof of payment needed)
2. One way transportation from origin to destination based on most direct route; economy airfare - 14 day advance purchase requested **or** one-way mileage, tolls and parking for up to 2 vehicles, based on most direct route (per IRS guidelines) For airfare reimbursement, itemized airline itinerary showing to and from cities/dates & times/traveler(s) names (full itinerary from airline website) and proof of payment (if not included in itinerary) required.
3. Up to 5 nights of reasonable lodging (less pet fees) – must provide itemized statement of room charges received at checkout

Miscellaneous Allowance:

A miscellaneous allowance up to of **\$5,000** (less tax) for relocation expenses not outlined in this policy, receipts needed.

Tax Implications:

The IRS considers all relocation expenses paid to you or on your behalf as taxable income. Taxable relocation payments (standard rate) will appear on your W-2 in the year the payment was disbursed to you.

At the beginning of each year, Focus will provide you with a Relocation Tax Report (RTR) that provides a breakdown of all relocation expenses that MLH has paid on your behalf.

Please note the following:

- It is imperative that you keep records and receipts of all expenses to manage the tax return filing process at year-end.
- Consult a professional tax advisor for details on the tax implications of your relocation.

Mileage:

Please note that mileage rates are based on IRS guidelines. These guidelines are likely to change at the beginning of each calendar year.

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