

BYU NEW HIRE MOVING INFORMATION MEMO

TO (New Hire): _____ DATE: _____

FROM (Employer): _____

RE: MOVING ALLOWANCE FOR NEW EMPLOYEE

TAXABLE LUMP SUM MOVING ALLOWANCE: \$ _____

To comply with IRS regulations, all moving allowances, moving advances, or moving expenses paid directly to vendors on behalf of the employee, are taxable to the employee. The total moving allowance benefit will be processed through payroll and applicable payroll taxes will be deducted, based on your completed W-4 on file with the payroll department. The moving allowance has been adjusted to include estimated tax implications for employees. However, actual individual tax situations may vary.

First, please call Erik Busath at 801-422-5259 to discuss the moving options and the moving procedure.

PROFESSIONAL MOVERS. If you are considering moving with a professional mover:

Please obtain estimates from at least two moving companies (Required) to achieve the best quote for your move. For one of your estimates, we recommend you contact Rachel Nielsen, the Customer Service Manager at Bailey's Moving & Storage, a local agent for Allied Van Lines at this number: 801-296-7403 or email Rachel.Nielsen@baileysallied.com Be sure to tell Rachel that you are a new BYU employee which will qualify you for a discount from the published pricing schedule, full valuation (insurance) on interstate domestic moves only at no additional cost, and a guaranteed priority move. Bailey's will bill BYU directly for the move. If you go with a professional mover, please send the two or more estimates to Erik.Busath@byu.edu and indicate in the email which estimate you selected and why.

Since professional moving companies can be very expensive, please consider actions you can take to lower the cost. For example, providing your own boxes and packing materials, reducing the number of items to be moved, and if you are able, packing your own boxes could result in savings for you and the university.

DO-IT-YOURSELF MOVERS. Budget Truck Rental gives BYU employees a discount. Please contact them by calling 888-868-5339. Ask them to look up the account number 064825 under Brigham Young University which confirms your identity as a new employee. We recommend that you get the quote in writing, book the quote with a credit card, and then get verification of the quote. Truck rentals are COD.

ABF U-PACK or PODS: Some employees have moved successfully with the services offered by these moving companies. (Information is accessible on their websites).

DISBURSEMENTS. Please complete the "Authorized Moving Allowance Request Form" (Form) and email to Erik Busath Erik.Busath@byu.edu if

needed to request a moving advance to pay the moving company and for other moving expenses. If you don't need an advance this form can be emailed after your move, so that you can better determine your total moving costs. Receipts do not need to be submitted unless a supplemental moving allowance is requested and approved by the Associate Academic VP or CFO.

Please notify me via email after your start date and after your move is completed. Also, indicate in the email whether you have set up payroll direct deposit and completed your W-4 for tax withholdings.

Answer all questions on the Form: Below are some Form Helps:

1. BYU ID (Found on BYU website by logging in using the same Net Id when you applied for the position), Cell Phone Number is preferred.
2. Taxable Moving Allowance. Reminder that payroll taxes will be withheld on the entire moving allowance based on your W-4 Form.
3. Family Size Moving. The size of the family is the number of eligible people in the household who will move, which includes the new hire, his or her lawful spouse, and unmarried children under the age of 26 who are financially dependent upon the employee.
4. Which company will you be moving with? Indicate professional or Self Move Company and the quoted amount. Estimated Total Moving expenses? Please indicate your best estimate of your total moving expenses. (Include cost to move household goods, hotels enroute, boxes/tape, and vehicle gas) If you move with Bailey's, they will send BYU the invoice. If the moving invoice is more than your moving allowance, you will be responsible for remitting the overage to Bailey's. Bailey's accepts credit card payments.
5. Indicate whether you would need a moving advance before your starting date to pay the mover or for truck rent, fuel, hotels, etc. An advance of up to 60% of your university provided moving allowance (if BYU is not paying the moving company) can be sent to you thirty days before your anticipated moving date. You will need to set up a payment elections (direct deposit) in Workday as per the instructions indicated on the Form. Please remember that the moving advance will show up on your MyBYU account as an amount due to the University until a month after your start date.
6. Please sign and date agreeing to the terms and conditions which include the terms "If I do not move or decide not to work for BYU, the entire moving allowance, if paid, will need to be remitted back to BYU within 30 days. If the amount paid by BYU on my behalf for moving exceeds the moving allowance, I agree to pay the overage to BYU within 30 days".

If you have any questions, please email Erik Busath at Erik.Busath@byu.edu or call at 801-422-5259

[05/25]

BYU AUTHORIZED MOVING ALLOWANCE REQUEST FORM

Employee Name: _____ BYU ID # _____

Phone Number: _____ Start Date: _____ College/Job Title: _____

University Taxable Lump Sum Moving Allowance: \$ _____ Family Size Moving? # _____

Anticipated Move Date: _____ Moving From: _____

Which Professional or Self Moving company will you be moving with? _____

Quoted Amount \$ _____ Estimated Total moving expenses? _____

Do you need a moving advance before your start date to pay the moving company and to pay for moving expenses (Available if BYU is not paying the moving company)? Yes (Y) ____ No (N) ____ . Amount requested \$ ____ . Up to 60% of the university provided allowance can be advanced 30 days before your move. If yes, setup payment elections (Direct Deposit) in Workday, click on your profile picture in right corner of screen, click View Profile, click Pay, click Payment Elections Tab, Add or Edit bank account information under Pay Type "Refunds and Reimbursements".

Was any house hunting assistance, temporary housing, rental car, or other related benefits provided by a BYU Department? ____ if yes, indicate the date range and please detail the expenses that were covered.

I agree to the following terms and conditions: The full moving allowance will be added as taxable income through payroll. Any advances and moving expenses paid by BYU will be deducted from my moving allowance. If I do not move or decide not to work for BYU, the entire moving allowance, if paid, will need to be remitted back to BYU within 30 days. If the amount paid by BYU on my behalf for moving exceeds the moving allowance, I agree to pay the overage to BYU within 30 days. In the event I am required to repay BYU based on the aforementioned conditions. I agree that if all charges I incur are not paid by the due date and if, for the purposes of collecting the amount due, BYU should retain an attorney or collection agency, I will pay all costs of collection including reasonable interest, reasonable attorney's fees, and reasonable collection agency fees, which may be based on a percentage at a maximum of 40% of the debt. I also agree to allow BYU or its agent to contact me by email or cell phone in an effort to collect the debt. I also authorize BYU or its agent to use automated telephone dialing equipment and to use artificial or pre-recorded messages in their efforts to contact me. Further I understand that I may withdraw my consent to BYU or its agent to use automated telephone dialing equipment or artificial pre-recorded voice messages to contact me by submitting my request to the BYU Collections Office via YMessage or in writing or verbally at A-153 ASB, Provo, UT 84602 (801)422-6634 or verbally or in writing to the applicable agent contacting me on behalf of BYU. Finally, I understand that my delinquent account may be reported to one or more of the national credit reporting agencies.

Employee Signature: _____ Date: _____

BYU REGULATORY TAX ACCOUNTING USE ONLY

Moving Taxable Allowance (MS) AC/CC-SC-CLASS _____ \$ _____

Moving Taxable Benefit: (MSNC) AC/CC-SC-CLASS _____ \$ _____

HH Reimbursement: (MS) AC/CC-SC-CLASS _____ \$ _____

HH Benefit: (MSNC) AC/CC-SC-CLASS _____ \$ _____

Moving/HH Advance: (MS) AC/CC-SC-CLASS _____ \$ _____

[5/25]

Notes: