

 Bristol

Relocation Solutions





The Bristol Experience

Founded in 1997, Bristol is an independently owned and operated global relocation management company. We ensure coverage worldwide through our tri-regional presence, managing moves from our Phoenix, AZ, headquarters and offices in Canada, the UK, and Singapore while also leveraging a remote workforce. Our dedicated professionals work tirelessly to ensure that every aspect of the relocation process runs smoothly from start to finish. Because we're not beholden to any outside interests or shareholders, we can provide our clients with unparalleled levels of flexibility and customization.

Our Services

We provide a full suite of global mobility services designed to make your experience seamless and stress-free. Our end-to-end management of relocations and assignments ensures that every detail is handled with precision. Whether you need fully outsourced program management or coordination of individual services, our customized solutions are tailored to meet your current and future needs. With Bristol, you can expect a smooth transition, reduced downtime, and a positive experience for your relocating employees.

Better with Bristol

What sets Bristol apart is our deep-rooted desire to build strong relationships with both our clients and their relocating employees. It's not just about crunching numbers or following established protocols; it's about connecting with people on a personal level and creating truly memorable moving experiences. Combining cutting-edge technology with human empathy makes even the most complex relocations feel like a breeze.

When selecting Bristol as your provider, you can rest assured that all aspects of your mobility program are Better with BristolSM.

Available Services for Your Program

Program Management

- Personalized Account Management
- Program Implementation Services
- Regular Program Reviews
- Cost Estimates & Projections
- Expense Management
- Supply Chain Management
- Lump Sum Move Management
- Core/Flex Program Management
- Group Move Management
- Sustainability Support

Consulting Services

- Policy Design & Implementation
- Policy Review & Industry Benchmarking
- Program Analysis & Improvement

Technology

- Industry-Leading Relocation Management System
- Client Web Platform
- Transferee Web Platform
- Mobile App
- Reporting
- Virtual Assistant (Penelope)

Pre-Move & Counseling Services

- Candidate Assessment & Selection
- Pre-Decision Assistance
- Employee Counseling & Needs Assessment
- VIP Services
- Repatriation Services

U.S. & Canada Home Services

- Home Marketing Assistance
- Buyer Value Option (BVO) Home Sale Program
- Fixed Fee Buyer Value Option (FFBVO) Home Sale Program
- Guaranteed Buyout Offer/Amended Value Sale Program
- Direct Reimbursement Home Sale Program
- Title & Closing Assistance
- Equity Advance
- Inventory Management
- Property Management
- Rental Assistance
- Home Finding Search/Home Purchase Assistance
- Mortgage Assistance

Moving Services

- Household Goods Move Management & Storage
- Insurance Coverage & Claims Management
- Discard & Donate
- Pet Shipment
- Vehicle (Auto) Shipment

Destination Location Services

- Airport Transportation
- Area Orientation/Preview Trip
- Hotel Stays
- Temporary Housing
- International Home Finding Assistance
- Tenancy Management
- Lease Assistance
- School Search
- Settling-in Support
- Vehicle Leasing/Purchase Assistance
- Furniture Rental
- Pivt: Social Media Settling-in Support
- Ongoing Assignment Support
- Duty of Care & Emergency Assistance Services

Transition Assistance

- Departure Services
- Visa & Immigration Support
- Cultural Training
- Language Training
- Diversity, Equity, and Inclusion Training
- Spousal Career Support
- U.S. Location Information Tool (NeighborhoodScout)
- Global Location Information Tool (wtrMobility)

Global Assignment & Compensation Services

- Complete International Assignment Compensation Management
- Assignment Letter/Repayment Agreement
- Compensation Counseling
- Cost Projections
- Balance Sheet Administration
- Compensation Accumulation
- Payroll Administration
- Cost of Living Support/COLA Administration
- Ongoing Payment Support
- Tax Support & Coordination



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Personalized Account Management

Bristol's mobility program management removes the cumbersome administrative burden for clients. We provide flexible, technologically advanced, and compassionate program management and service delivery, enabling our clients to focus on the critical aspects of their program — recruitment, retention, risk, and financial performance.

Each client is assigned a dedicated leader from our Client Engagement team who serves as the single point of contact for all your account management needs. They offer personalized insights to ensure your program remains competitive, cost-effective, and tailored to your relocating employees' unique requirements. With Bristol on your side, you can focus on the tasks that matter most.

Program Implementation Services

Bristol understands that every implementation has its own distinct characteristics, which is why we design an individualized implementation strategy for each client using our advanced project management platform. Drawing upon our extensive expertise gained over many years of successful client transitions to Bristol, we recognize that drawn-out contractual discussions often result in delayed signatures and go-live dates, with contracts sometimes requiring several months to finalize. To proactively address this challenge, we concurrently manage the negotiation and implementation processes.

Regular Program Reviews

Based on your preferred schedule, the Bristol Client Engagement lead delivers a comprehensive program review, providing updates for ongoing strategies, sharing industry news, reviewing satisfaction scores & volumes, focusing on efficiencies, discussing & interpreting various reports, and reviewing agreed-upon key performance indicators. These meetings are strategic opportunities to strengthen our partnership.

Cost Estimates & Projections

Bristol specializes in providing comprehensive domestic and global cost projections tailored to your organization's policies and unique requirements. Our approach involves collaborating closely with an extensive network of supplier-partners spanning the globe, ensuring precise and current data for all associated expenses.

For international assignments, our detailed estimates encompass origination fees, destination charges, ongoing expenditures, and any needed hypothetical tax calculations. Additionally, we offer a self-service tool and a pre-planning cost estimate feature (known as "What-If" Cost Estimates), designed for clients to quickly generate and view the cost impact of various hypothetical relocation scenarios.

Expense Management

Bristol offers relocation accounting and expense processing services with unparalleled precision and promptness. Our team has extensive experience working with various payroll systems, enabling us to seamlessly integrate with your existing processes. With our comprehensive range of reporting options, you can expect detailed audits, meticulous tracking, and efficient handling of employee reimbursements, vendor payments, cost-center allocations, and tailored financial reports for both accounting and payroll purposes.

Additionally, through our user-friendly website and mobile application (available on both Android and iOS platforms), your employees can easily submit expenses by capturing images of their receipts while on the move. We will streamline your relocation accounting process, enhance productivity, and improve overall operational efficiency.



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Supply Chain Management

Bristol is privately held and independently owned and operated. We have no affiliations, exclusive arrangements, ownership interests, or other relationships with any organization providing relocation services. Bristol's Global Supplier-Partner Management team formally sources and qualifies suppliers by industry/service type and location. Many of our competitors sell services from companies that they own or are affiliated with (such as van lines, real estate networks, corporate housing, or destination services providers), and they are under contractual agreements to operate in a specific way. Bristol is completely free to choose the best suppliers at the best value for you and your relocating employees. BristolNet suppliers are chosen based on their ability to deliver best-in-class services that are both high quality and cost effective. We can also include client-directed suppliers thanks to our flexible and independent approach to supply chain management.

Lump Sum Move Management

Your relocating employees can receive lump sum benefits from a self-service tool within the BristolElite platform that allows them to track their spend, access preferred suppliers, and quickly contact someone for guidance when questions or issues arise. This tool is available for both international and domestic programs. Our lump sum technology is easy to use and provides access to specific BristolNet supplier-partners at our negotiated rates, allowing the relocating employee to request an individual quote.

One of the major benefits of our lump sum tool is that it is part of the BristolElite system and not a separate, standalone tool built on another platform. This means that all client move types are handled within the same system, with all program data stored in the system for comprehensive reporting on any aspect of the program. Your mobility team will have access to all transactions, live and in real-time with no separate reporting reconciliation required.

Core/Flex Program Management

Bristol has experience in core/flex program management and policy redesign. With core/flex policies, you can proactively build in accommodations for diverse employee needs upfront rather than having to accommodate with exceptions or future policy redesign. The core/flex setup within our BristolElite platform is configurable to synchronize with your policies and can be established using a dollar or points-based model. To set up our system accordingly, Bristol will work with you to determine and provide consultative recommendations regarding which services are to be offered as core and which ones will be flexible. From there, we jointly determine what "guardrails" or restrictions to place on the flex options.

Group Move Management

Bristol leverages our in-house Consulting Services resources, technology, and project-management tools to successfully manage group moves. We offer pre-decision consultations & tours, employee surveys, group move planning, budgeting, & financial analysis, policy development, on-site counseling, newcomer kits, and announcements/ongoing communications.

Sustainability Support

We assist clients in meeting their own corporate social responsibility (CSR) goals, offering transparent reporting on the carbon emissions caused by sponsored relocations, engaging diverse third-party suppliers, providing diverse-supplier utilization reporting, and connecting clients to best practices through client & supplier roundtables.



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Policy Design & Implementation

Bristol offers focused policy consultation, industry-specific benchmarking, and program development recommending best practices for your mobility and talent management goals based on current data and trends. Our process includes review, benchmarking to comparative programs & gap analysis, recommendations with cost modeling for proposed updates, and development of written policy templates.

Policy Review & Industry Benchmarking

We draw upon our expansive multinational client base, proprietary research, and a wide assortment of external survey data to benchmark your policies according to current best practices, which can be tailored to your industry and/or key competitors. This provides a deeper understanding of your organization's position in the marketplace, ensuring competitive benefits and mobility practices for your program.

Program Analysis & Improvement

To ensure your program meets your goals and objectives, we go beyond policy design to identify process improvement, cost savings, opportunities for improved efficiencies & communication, and policy enhancements. We will review internal administrative procedures and reporting, billing, and payroll processes. We can also administer "voice of the customer" survey data (insights from your own relocating employees) to determine the effectiveness and competitiveness of your program. After thorough analysis, we make recommendations and conduct training for all relevant stakeholders as changes are implemented.

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Industry-Leading Relocation Management System

We have built our relocation management system, BristolElite, on Equus' industry-leading relocation management platform. Because of this, we are in a unique situation in which we own, maintain, and develop our technology platform but also benefit from Equus' continuous improvements and enhancements to the system. BristolElite connects client mobility stakeholders, relocating employees, Bristol associates, and Bristol supplier-partners through seamless GDPR-compliant data sharing, reporting, and communication capabilities on a 24/7 basis.

Client Web Platform

BristolElite provides your mobility team with online authorization capabilities, payroll & HRIS integration ability, cost estimate creation, exceptions approval/denial & tracking, document & policy storage, reporting, invoicing, location information, and much more. The BristolElite dashboard also provides tools for tracking all employee relocation data (employees on assignment, home and host locations, start and end dates of work permits, leases, assignment duration, etc.).

Transferee Web Platform

BristolElite offers your relocating employees move tracking and monitoring. A "What's Happening" view displays a timeline of events, dates, and important information to prepare employees for upcoming move milestones. Your relocating employees also benefit from the ability to provide access to multiple delegates, exchange & sign documents, provide real-time feedback on how they feel the move is going, submit expenses & track reimbursements, and access local insights on U.S. neighborhoods and thousands of cities worldwide.

Mobile App

Bristol's mobile app (available on Android and iOS) is integrated with BristolElite. It provides relocating employees with 24/7 smartphone access to the platform, allowing them to view real-time key details & dates on services, review policy information, submit expenses with uploaded photos of receipts, and contact their Mobility Advisor.

Reporting

BristolElite provides all reporting, tracking, and monitoring, capturing over 13,500 different data points that include numerous chronological and financial metrics to track ongoing performance. Bristol provides more than 35 standard reports such as budget versus actuals, active caseload, client expense detail, and approved/denied exceptions. Your mobility team can also create custom and ad hoc reports that are available at any time via the BristolElite platform. There is virtually no limitation to the types of reports that can be created through the system. During the implementation process, we will work with you to determine which fields are critical for your organization and classify each of the required fields as "mandatory" to ensure that we are gathering all information that could be required in future report requests.

Virtual Assistant (Penelope)

A chatbot named Penelope welcomes questions from relocating employees in BristolElite and uses artificial intelligence and natural language processing to provide fast and accurate answers to their questions about getting started with a move, expenses, and much more.

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Candidate Assessment & Selection

Bristol can assist you in determining whether a relocating employee is equipped with the cross-cultural competencies to adapt to life in another country. We use a combination of validated candidate assessment tools and screening/selection techniques in an expert-facilitated interview where the candidate (and their partner) examine the timing and fit of the move so that they and your mobility team are able to make an informed decision about readiness and likelihood of relocation/assignment success.

Pre-Decision Assistance

Bristol offers a one-on-one pre-decision consultation call with a Mobility Advisor prior to the employee accepting a relocation or hire. Our Mobility Advisors can ask in-depth questions and provide value-added destination information and tools to sell the new location. We also offer pre-decision home appraisals and schedule travel and area tours as applicable.

Employee Counseling & Needs Assessment

We designed Bristol's service delivery model to provide an exceptional customer experience that is high-touch, responsive, and proactive. To deliver this experience, we assign a dedicated, skilled, and knowledgeable team member — the Bristol Mobility Advisor — to support each relocating employee. The Mobility Advisor serves as the single point of contact responsible for ensuring a successful move, providing guidance through consistent touchpoints while liaising with and managing the BristolNet supplier-partners delivering on-the-ground services.

The Bristol Mobility Advisor provides the relocating employee with an understanding of applicable relocation benefits and services per your policy on an initial and ongoing basis. An in-depth needs assessment is first conducted with the relocating employee to gain an understanding of any potential concerns and provide information, feedback, and links to key resources to ensure that the employee's questions are answered.

Our Mobility Advisors are driven by genuine need to connect with relocating employees in a meaningful way that enhances their relocation experience. We consider relocation a major life event — understanding the value of personal belongings and family members involved — and we devote significant time and attention to each relocating employee.

VIP Services

In the same way that the Bristol Mobility Advisor guides a relocating employee, a highly experienced and tenured Senior Mobility Advisor will assist your VIP and involved supplier-partners with touchpoints customized to the VIP's preferences. We can tier standard service packages — enhancing services with a higher-touch element — or manage and deliver entirely unique service offerings with complete oversight from a Senior Mobility Advisor. Unique services available to VIPs include the help of professional organizers to manage household goods packing/unpacking at origin and destination, assignment of a cleaning crew at either origin or destination, and concierge pick-up & escort assistance at the destination location.

Repatriation Services

We treat a repatriation or reassignment as an entirely new event, providing the same level of focus and attention that we provided at the commencement of the assignment.

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Home Marketing Assistance

Bristol assists the relocating employee in the marketing of their origin property. Assistance includes appraisal request and review, broker selection, marketing strategies, and offer negotiation. We begin by contacting a minimum of two real estate brokers/agents, obtaining a minimum of two Brokers' Price Opinions, and reviewing the potential marketing plans. Once a listing agent is selected, Bristol closely supervises them and reviews all marketing materials to ensure the sale is managed effectively. We also require the agent to provide weekly updates (on housing trends, new competing listings, and recently sold similar properties) for the Mobility Advisor to conduct follow-up conversations with the employee that are designed to keep the sales strategy on track. When an offer is received, the Mobility Advisor also provides guidance in negotiating the terms of the sale.

This service can be provided as a standalone or delivered in conjunction with the other home sale programs described on this page.

Buyer Value Option (BVO) Home Sale Program

In this program, Bristol purchases the home at the price determined by an outside buyer's offer and then sells the home to the outside buyer at the agreed price. The BVO reduces a client's overall program costs (compared to the commonly paid gross-up amounts associated with a taxable reimbursement of closing costs) by having the company absorb the risk of home ownership, which tax-protects the sale.

Fixed Fee Buyer Value Option (FFBVO) Home Sale Program

Our fixed fee BVO program eliminates the risk of homes entering inventory and reduces a client's overall costs by eliminating gross-up payments. Additionally, it eliminates the risk of inventory by having Bristol absorb the risk of home ownership.

Guaranteed Buyout Offer/ Amended Value Sale Program

In this program, once the home's purchase price is determined by the average of two appraisals, Bristol purchases it from the relocating employee on the client's behalf. Typically, this program requires a mandatory marketing period in which the relocating employee seeks an outside buyer. This is known as an Amended Value Sale. Bristol manages listing the home for sale and then amends the original appraised value offer to match the purchase price offered by an outside buyer. Bristol then sells the home to the outside buyer. This is a tax-protected program that eliminates gross-up costs.

Direct Reimbursement Home Sale Program

Bristol audits the final closing statement for normal and customary closing costs and reimburses the relocating employee for related expenses. This is a taxable event to the employee that you may decide to gross up.

Title & Closing Assistance

Bristol manages and coordinates payment of all legal and real estate services required in closing the sale of a relocating employee's origin property. Our preferred supplier-partners provide discounted rates on closing and title services.

Equity Advance

Bristol can advance equity funds to the relocating employee to help them secure a home in the new location or have faster access to cash.

Inventory Management

Bristol's dedicated team of Real Estate Specialists are involved from the beginning of pre-marketing through inventory to thoroughly review the appraisals and inspections, create a marketing strategy with the listing agent, and price the home accordingly to ensure a buyer is found quickly.

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Property Management

Bristol cares for any occupied or vacant primary residences that relocating employees wish to retain. We find and screen tenants, maintain the property (e.g., manage lawn care and snow removal), and manage any financial obligations for the home. Vacant-property management includes security surveillance as well. This assures the employee that their home is well looked after in their absence, allowing them to focus on the objectives of their assignment.

Rental Assistance

Bristol assists the relocating employee in selecting and securing a rental property at their destination. We introduce them to an experienced rental agent (as applicable), screen available properties, arrange viewing appointments, and assist with lease negotiations in accordance with personal preference and corporate policy. Program options are based on hours allocated for accompanying rental visits, and we also offer an unlimited program for viewing properties. Bristol can pay the security deposit and first month's rent as well as make ongoing rental payments on a monthly, quarterly, or any other periodic basis.

Home Finding Search/Home Purchase Assistance

We introduce the relocating employee to an experienced local real estate agent from our BristolNet supplier-partner network. The agent accompanies the employee on home-viewing appointments and provides information about housing, communities, and schools. The Bristol Mobility Advisor stays closely connected to the agent and employee and will provide guidance through the selection process & negotiation, screen & review selected properties, review the sales agreement, and provide legal service assistance (based on policy). We also offer referrals to our mortgage partners and title and closing partners to provide added value — and even cost-savings opportunities — for the employee.

Mortgage Assistance

We offer BristolNet mortgage lenders for both home sale and purchase services and can also integrate your preferred lenders for relocating employees. Our preferred lenders have provided relocation solutions to companies for decades and have the resources to ensure compliance with rapidly evolving regulations. They also offer the ability to work with international buyers to establish credit to purchase a home in the new location. Even if the relocating employee opts not to use one of our providers, the Mobility Advisor can provide assistance and guidance regarding policy or status with home sale while the employee's purchase transaction is in the processing or underwriting stages.

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Household Goods Move Management & Storage

Bristol coordinates moving a relocating employee's household goods from origin to destination according to your policy and host-country immigration and customs requirements (if applicable). We provide counseling and support to the relocating employee throughout the process. Additionally, we offer short- and long-term storage options, including temperature-controlled facilities through our network of household goods partners.

We maintain relationships with multiple supplier-partners in every market, allowing us to choose the best match (based on price, geographic coverage, service scores, etc.) for each individual move. Working as your move manager, we perform contract and rate negotiations in order to identify cost efficiencies and maintain the highest level of service. Finally, we use a standardized invoice audit process to verify the charges involved and ensure policy compliance.

To ensure best pricing, Bristol utilizes a technology solution through our partnership with CEND (formerly PricePoint) — an independent pricing solution — that helps to quickly compare movers' pricing (and performance) before the survey process. This empowers us to award competitively priced moves faster, improving relocating employees' satisfaction. This solution simplifies the process for everyone and enables our clients to save 10-15%.

Insurance Coverage & Claims Management

We offer standardized insurance programs through an independent global provider, offering broad-based coverage programs at low costs. Additionally, our move management program provides claims coordination and risk avoidance. Bristol conducts pulse checks for packing, loading, and delivery. We partner with an objective, third-party provider to work through the claims process, and we provide claims support or mediate and escalate issues appropriately.

Discard & Donate

The Discard and Donate program is a proactive approach to help relocating employees identify items that they may not want or need in the new home. An organizer will work with the relocating employee to make the arrangements to have those items donated, discarded, or sold. The cost of the service is guaranteed not to exceed the savings realized by reducing the shipment size. Our clients experience significant savings through using this service.

Pet Shipment

Our pet relocation services professionally manage a pet's move experience, covering ground transportation, flight arrangements, travel itinerary, airline-approved sky kennels, health documentation & permits, government & consulate validation, customs clearance, and any required quarantine.

Vehicle (Auto) Shipment

Bristol's network of auto shipment providers offers safe and experienced shipment of a relocating employee's vehicles.

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Airport Transportation

Bristol can arrange for airport transportation and a meet & greet with one of our local partners, providing a positive, concierge experience in the destination location.

Area Orientation/Preview Trip

Bristol provides an orientation tour of the destination location. This can be used as an opportunity to showcase a location to an employee considering whether to accept a relocation/assignment, to help decide which neighborhood to live in, or to provide an extensive tour of the city after relocating.

Hotel Stays

Bristol partners with Engine to connect relocating employees to wholesale hotel rates that are otherwise unavailable to the public for more than 150,000 hotels worldwide. Savings of an average of 26% off public rates can be realized from local hotels to popular brands.

Temporary Housing

Temporary housing can help bridge the gap between a move date and new home availability. In collaboration with our BristolNet supplier-partners, we source temporary living options and review these with the relocating employee to select a facility in accordance with personal preference and your policy.

International Home Finding Assistance

Bristol helps the relocating employee select and secure a residence in their destination location. Our program includes an introduction to an experienced home search agent, screening & selection of available properties, scheduling viewing appointments, and assisting with lease negotiations in accordance with personal preference and company policy.

Bristol is able to pay the security deposit and first month's rent to secure rental properties in the destination location. Additionally, Bristol can also make ongoing rental payments on a monthly, quarterly, or any other periodic basis.

Tenancy Management

Our program manages the relocating employee's tenancy in the host country throughout their assignment. Bristol manages interaction with the landlord/managing agent (as necessary) and administration such as lease & renewal negotiations, timely rental payments, lease end tracking & notification to landlord on termination, inventory check-in & check-out coordination, review of any dilapidation costs, and return of security deposits.

Lease Assistance

In cases where Bristol does not provide full tenancy management, we capture and monitor assignment lease dates (e.g., start date, break-clause date, and end date) to report and advise on each stage's requirements and perform lease negotiations, renewals, and cancellation for the employee.

School Search

In collaboration with our BristolNet supplier-partners, we offer an array of in-person and virtual school search options. Programs are designed to assist the relocating employee and family with completing registration and entry requirements and in assessing the suitability/availability of the various types of schooling, including those that offer specific country national or international curriculum/qualification.

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Settling-in Support

We support relocating employees and families settling into their new location by offering support with car registration & driver's license applications, medical services registration (e.g., doctor, dentist), opening bank accounts, and set up of cable, internet, phone, & utilities. We also provide literature, emergency numbers, and contact information of embassies/consulates along with review of shopping, worship centers, the healthcare system, and networking. Finally, to ensure local government compliance, the relocating employee is given the local registration and requirements for living and working in their new country.

Vehicle Leasing/Purchase Assistance

We work with a global supplier to arrange long-term car rentals and purchases for relocating employees.

Furniture Rental

Bristol coordinates furniture rental for relocating employees through a global furniture rental supplier that accommodates each relocating employee's unique preferences and requirements.

Pivt: Social Media Settling-in Support

Pivt is the first mobility-focused social networking app designed to help relocating employees and their families connect in their new city so that it can feel like home. The app provides curated advice from users, enabling families to acclimate with their new community prior to the move. It also connects users based on interests, passions, and goals, featuring community groups that allow relocating employees to create connections and attend events.

Ongoing Assignment Support

Bristol provides ongoing assignment expense tracking and reporting, including expense reimbursements and allowance, per diem, household goods storage, and schooling payments. Once the assignment begins, the Mobility Advisor makes monthly check-in calls to answer any questions that may arise and to ensure the employee continues to acclimate to the new location.

Duty of Care & Emergency Assistance Services

Bristol's service delivery team responds quickly to crises with measures to assist and extract impacted employees. Additionally (and if needed), we partner with a leading global health and security company to support aspects of clients' duty of care (e.g., risk avoidance, evacuations).

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If a relocating employee needs to cancel a lease in the origin location, Bristol reviews the contract and provides counseling and assistance in the negotiation of applicable lease-cancellation penalties, completes any documents necessary under the laws governing the lease cancellation, advances the pre-payment penalty to the landlord, and reimburses the pre-payment penalty to the relocating employee.

We also offer services to assist with the disposal of vehicles in the home location and can reimburse an employee's claim for loss on an auto sale.

Visa & Immigration Support

Through our supplier-partners, we offer a streamlined and cost-effective solution for passports, visas, work permits, and residence permits. Bristol offers all necessary assistance through every stage, including procuring required documents, handling potential changes based on revised assignment parameters, processing renewals, and filing applications for permanent residency. Bristol's outsourcing solution ensures legal compliance, accurate tracking of expiration dates, and clear, concise counseling to ensure that the immigration process is completed in the most efficient manner possible.

Cultural Training

In collaboration with our BristolNet supplier-partners, we offer an array of cultural training programs, including self-paced online courses, face-to-face, and virtual options that cover the behavioral adjustments required to operate in the host country culture; these programs are also offered for youth/children. Training courses are designed to assist the relocating employee and family with developing a suitable level of knowledge and readiness for key cultural expectations in the host country.

For non-relocating employees and global teams, we can also provide seminars and special consultations regarding negotiation, global awareness, or doing business in a particular country.

As an additional resource available through our partnership with World Trade Resource (WTR), we are able to offer GoWorldWise, a comprehensive modern cultural training/coaching tool that covers over 200 countries and thousands of cities. GoWorldWise sets a relocating employee up for success pre- or post-arrival in their new location by building cultural awareness and strategies to develop cultural competency during a facilitated, interactive, coaching session.

Language Training

As a company focused on human connection, we understand the importance of being able to communicate in the local language. Bristol offers customized, individual language training in locations throughout the world, typically in 50- or 100-hour increments based on your policy parameters. Because the service is convenient, relocating employees are less likely to miss lessons, ensuring maximum return on investment in the service.

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Diversity, Equity, & Inclusion Training

Through our partnership with World Trade Resource (WTR), we offer JUSTWise, a digital learning experience where three diversity, equity, and inclusion (DE&I) level-based solutions are available with a focus on the employee, manager, and leader. This solution is designed to drive cultures of belonging by helping organizations offer the ability for their employees to grow and develop in a diverse and inclusive global society by examining DE&I and culture shift.

Spousal Career Support

Relocation success depends not only on employee satisfaction but also on the experience of the accompanying family. We provide career and family assistance through our alliance with an industry leader in outplacement and career transition services. With our program, each individual receives comprehensive support including career continuation, career and job search assistance, and lifestyle resources that build employment skills. Each service is delivered through a combination of high-touch and high-tech support. In addition to telephone counseling, individuals receive customized research, assistance with résumé writing, cover letter templates, information regarding networking contacts, educational materials, and pre-researched job links.

U.S. Location Information Tool (NeighborhoodScout)

Mobility program stakeholders and relocating employees have free access to an online database of U.S. neighborhood analytics that offers neighborhood reports and a search function for users to select the location characteristics that are important to them and return a list of their best neighborhood matches. The site is a recognized resource for nationwide crime data, school ratings, home appreciation, demographics, and trends, and it is a listed relocation reference from the U.S. Department of State.

Global Location Information Tool (wtrMobility)

BristolElite includes wtrMobility, which provides real-time data for over 200 countries and thousands of cities worldwide (amassed from over 500 live API feeds combined with 50 editors and 800 research analysts continuously updating the data at World Trade Resource).

Relevant information for mobility program stakeholders includes market trend analysis, labor market & compensation survey data, travel tax calendars, site selection & group move tools, local market overviews (e.g., housing supply and availability, housing costs by assignee level, best-in-class destination services providers, city-specific rental practice information), and ongoing support for every location.

Information for relocating employees includes country & individual location guides, rental practices, transportation, medical, safety, business etiquette, and information regarding applying for a social security number & opening a bank account.

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Complete International Assignment Compensation Management

Expatriate compensation management is an in-house core competency of Bristol. We coordinate all aspects of international assignee compensation including initial pay schedules, foreign allowance calculations & updates, payroll reporting, compensation accumulation, and year-end total compensation reporting, paired with ongoing communication with your HR and payroll departments, external tax providers, and assignees.

Assignment Letter/ Repayment Agreement

Bristol may take charge of the preparation of formal assignment letters, which outline all of the terms and conditions of the international assignment. We will work with you to develop the letter templates and then customize the letter per policy and any specific assignment needs. Terms and conditions in the letters typically include expected assignment duration, compensation elements (e.g., base salary, bonus, goods & services, housing, foreign service & hardship premiums, tax equalization methodology, pre-assignment policies (e.g., pre-decision trip, visa and immigration support, medical exams), all relocation provisions, general policies during assignment, and repatriation policies.

We also include the repayment agreement (as applicable) in the assignment letter and will recoup all or part of the monetary value of relocation benefits (as applicable) if the employee terminates the assignment.

Compensation Counseling

During the initial counseling call with the relocating employee, the Bristol Mobility Advisor reviews all the benefits outlined in the relocation/ assignment policy and/or the assignment letter. If compensation-related elements are outlined in the assignment letter, these items (e.g., compensation, allowances) and other assignment-related services and policy benefits are explained. Payment schedules are also discussed. Bristol can share balance sheets (compensation-related worksheets) with the relocating employee via BristolElite as a reference of the elements that will impact the employee's compensation.

Cost Projections

Bristol performs a comprehensive initial cost estimate (or budgeting) for assignments (both short and long term) detailing the anticipated costs of each and every compensation and relocation element, including hypothetical calculations for taxes in both the home and host location based on the assignment type — custom-tailored to your unique policy.

We also offer a free self-service tool that provides a pre-planning cost estimate (Equus' "What-If" Cost Estimates) in the BristolElite platform for you to quickly create and view the financial impact of a hypothetical assignment. Reports are available to compare costs of hypothetical scenarios, view the cost estimate details, or review and audit the hypothetical tax calculations.



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Balance Sheet Administration

Bristol administers balance sheets, payroll instructions, and shadow payroll. Our system is designed to track and calculate salary information from the very first cost estimate throughout the life of the assignment. Salary details can be designed to increase annually based on either a fixed or percentage amount, and salary caps (or bands) can be implemented to set thresholds for certain allowances. Depending on your compensation methodology (total compensation versus split payroll methodology), Bristol's system is configured to report and follow the methodology set up for various payroll systems.

Ongoing Payment Support

Our global compensation team expertly administers ongoing housing allowances and/or rent and utility payments directly on behalf of your assignees in accordance with your administrative needs. Tracking and reporting for tax compliance purposes is also provided.

Compensation Accumulation

We perform compensation accumulation and data aggregation (typically on a monthly basis). Bristol's system is designed to provide visibility into this process, allowing you to view reporting details within BristolElite.

Bristol prepares a final, thorough, and accurate year-end Global Statement of Earnings for each assignee that is ultimately delivered to your third-party tax provider, which will in turn ensure compliant and accurate filing to worldwide tax authorities.

Bristol's year-end reporting and Global Statement of Earnings can be configured to define what has been paid, in what currency, and when and whether it was paid by home payroll, host payroll or AP, an external partner like travel, immigration, or tax, or through the relocation or assignment process (by the RMC). This information is crucial for your tax partner to ensure accuracy and compliance and provide complete details in order to finalize tax equalization, payments, and tax reporting.

Payroll Administration

Bristol provides both periodic and year-end reporting to various internal client teams (e.g., payroll and tax functions) as well as the external tax firm. We also monitor all relevant factors associated with the assignment. For example, if a short-term assignment is extended or transitioned to a long-term assignment, Bristol can pivot quickly to change the associated taxability and reporting requirements.

Cost of Living Support/ COLA Administration

Bristol provides analysis, advice, and reports to determine whether a cost-of-living allowance (COLA) is appropriate for a relocating employee. Reports are based on an employee's annual income, family size, origin and destination location, and whether they are homeowners or renters. We then aid in the administration and communication of these allowances.

Tax Support & Coordination

Bristol provides a suite of tax-support services ranging from tax briefing and return services to equalization and social insurance enrollment (or totalization agreements). We will seamlessly integrate your tax partner(s) into our system, allowing them to easily push and pull real-time data.

Our broad network of tax experts can assist with any mobility program-related tax concerns, such as assignment planning and compensation strategies, development of tax policies, home- and host-country tax planning, hypothetical tax estimates, balance sheet development and review, and annual tax equalization calculations.

Bristol calculates tax equalization deductions and payments initially via cost estimates and then throughout the life and individual phases of an assignment. Bristol can produce these calculations through Equus' own proprietary calculations, your external tax firm, or other third-party data providers' calculations. These values can be updated based on such factors as annual increases in compensation elements, changes in family details, or changes to the tax rules. Our flexibility allows Bristol to provide a variety of tax calculations for our clients.

