

RELOCATION SOLUTIONS

Bristol Global Mobility offers the full suite of services mobility professionals expect and relocating employees require today. From total relocation program management to coordination of logistical services, the customized solutions we design for our clients continuously evolve our worldwide service offerings.



BRISTOL
GLOBAL MOBILITY



Connecting with, versus Controlling People.™



BRIEFLY: WHO IS BRISTOL?



Bristol is an independently owned and operated global relocation management company headquartered in Phoenix, Arizona. Bristol's autonomy allows our associates to focus on delivering a complete breadth of domestic and global mobility services with our full attention and flexibility. We excel when it comes to intelligently integrating all mobility constituents in ways that create consistent value on behalf of our clients and meaningful move experiences for their relocating employees. The experience Bristol delivers isn't just fueled by the data of best practices nor the expertise gained through our 25+ years in mobility, but a genuine need to connect with our clients and their relocating employees in a meaningful way. This is our relationship-centered philosophy of *Connecting with, versus Controlling People.*SM



SERVICES WE CAN INCLUDE IN YOUR PROGRAM

PROGRAM MANAGEMENT

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

CONSULTING SERVICES

Policy Design and Implementation
 Policy Review: Industry Benchmarking
 Program Analysis and Improvement

TECHNOLOGY

Client Move Management Platform
 Relocating Employee Platform
 Mobile App
 Reporting
 Predictive Analytics
 Virtual IBM Watson Assistant

RELOCATION SERVICES: GETTING STARTED

Candidate Assessment and Selection
 Pre-decision Assistance
 Relocating Employee Needs Assessment
 Relocating Employee Counseling
 VIP Services
 Elder Care Services

HOME SALE & DEPARTURE SERVICES

Buyer Value Option (BVO) Home Sale Program*

Fixed Fee Buyer Value Option (FFBVO) Home Sale Program*
 Appraised Value Sale (Guaranteed Buyout Offer) Home Sale Program*
 Amended Value Sale (Guaranteed Buyout Offer) Home Sale Program*
 Direct Reimbursement Sale Home Sale Program
 Inventory Management*
 Home Marketing Assistance
 Title and Closing Assistance*
 Bristol Home Rewards*
 Property Management
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MOVING SERVICES

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

DESTINATION SERVICES

Local Area Orientation/Preview Trip
 Travel Assistance
 Hotel Stays
 International Home Finding
 Home Finding Search/Home Purchase Assistance
 Equity Advance*
 Mortgage Assistance*
 Temporary Housing
 Rental 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
 Tenancy Management
 Lease Assistance

TRANSITION ASSISTANCE

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

GLOBAL ASSIGNMENT & COMPENSATION SERVICES

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 and Coordination

*Service is available only in the U.S. and Canada





PROGRAM MANAGEMENT

Bristol's mobility program management eliminates cumbersome administrative burdens for clients. Our guiding operating principle of **Connecting with, versus Controlling People.**SM extends throughout our organization, producing a flexible, technically proficient, and compassionate program management and service delivery approach. This enables our clients to effectively manage the recruitment, retention, risk, and financial aspects associated with a mobile workforce.

We assign each client a dedicated leader from our Client Engagement team to serve as the single point of accountability responsible for providing a full suite of customized, responsive, and strategic account management services to the client's team. This individual delivers valuable insight to keep our clients' programs competitive, cost-effective, and aligned with the needs of their relocating talent.



Program Implementation Services

Bristol is mindful that implementations have unique nuances, and we develop each client a custom implementation plan using our project-management software. Based on our decades of experience implementing new clients, we know contract negotiations can delay signings and implementations, and contracts can take months to execute. We overcome this obstacle by running negotiations and implementation at the same time. We are well versed in implementing clients in 30 days.



Regular Program Reviews

On a regular basis, the Bristol Client Engagement lead takes a proactive approach to review the overall program, provide updates on ongoing strategies, share industry updates, review satisfaction scores and volumes, focus on efficiencies, discuss and interpret various reports, review agreed-upon key performance indicators, and more. These meetings are strategic opportunities to strengthen our partnership.



Expense Management

Bristol's relocation accounting and expense processing services ensure timeliness and accuracy. We can seamlessly interact with payroll departments running a variety of payroll programs and deliver a multitude of reporting options including audit, tracking, and reimbursement of employee reimbursement requests; audit, tracking, and payment of supplier invoices; coding and reporting of cost center information; and customized accounting and payroll reporting.

For clients' relocating employees, expense submission on the go is easy as they can upload photos of receipts in Bristol's mobile app (available on Android and iOS).



Cost Estimates & Projections

Bristol performs domestic and international cost projections based on templates we customize for clients' policy and/or move types. We coordinate with providers worldwide to ensure accuracy and that third-party costs are always up to date.

International estimates are based on the authorized benefits and assignment length and provide a cost breakdown including origin costing, destination costing, on-assignment costing, and hypothetical calculations, if needed.

We also offer a self-service tool and a Pre-Planning Cost Estimate (Equus's "What-If" Cost Estimates), in BristolElite for clients to quickly create and view the financial impact of a hypothetical relocation scenario.



Supply Chain Management

Bristol is privately/independently owned and operated, and we have no affiliations, exclusive arrangements, ownership interests, or other relationships with any organization providing relocation services. Bristol's Global Supplier-Partner Management (GSPM) 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 (e.g., van lines, real estate networks, corporate housing, or destination services providers), and they are under contractual agreements to operate in a specific way. By distinction, we are completely free to choose the best suppliers at the best value for our clients and their relocating employees. BristolNet suppliers are chosen based on their ability to deliver best-in-class services that are high quality and cost effective.





Lump Sum Move Management

Relocating employees can receive lump sum benefits from a self-service lump sum tool within our BristolElite platform that allows them to track their spend, access preferred suppliers, and quickly contact someone for guidance when questions or issues arise. We can offer such a tool for the administration of 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 from which the relocating employee can request an individual quote. We can also include client-directed suppliers thanks to our flexible and independent approach to supplier management.



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 and tours; employee surveys; group move planning, budgeting, and 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 whether that's through providing transparent reporting on the carbon emissions caused by sponsored relocations, engaging diverse third-party suppliers and providing utilization reporting, connecting clients to best practices through client and supplier-partner roundtables, and more.



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 of a client's 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. Clients' mobility stakeholders have access to all transactions, live/in real-time with no reconciliation of separate reporting required.



Core/flex Program Management

Bristol has experience in core/flex program management and policy redesign. With core/flex policies, our clients can build in accommodation for diverse employee needs upfront proactively rather than accommodate with exceptions or policy redesign down the road. The core/flex setup of our BristolElite platform is configurable to synchronize with a client's policies. To set up our system accordingly, Bristol engages our client in a scoping conversation regarding what services are core and what are flex. From there, we jointly determine what "guardrails" or restrictions to place on the flex options.





CONSULTING SERVICES

Bristol's dedicated consulting staff provide keen insight into mobility trends and best practices, tailoring expert advice and recommendations to each client's unique circumstances and strategic priorities. Popular programs of assistance include:

Policy Design and Implementation

Bristol offers focused policy consultation, industry-specific benchmarking, and program development relating best practices to each client's mobility and talent management goals. Our process includes review, benchmarking to comparative programs and gap analysis, recommendations with cost modeling of proposed updates, development of written policy templates, and more.

Policy Review: Industry Benchmarking

We draw upon our expansive multinational client base, proprietary research, and a wide assortment of external survey data to benchmark a client's policies according to the best practices in their industry or of key competitors, which aids in understanding a client's position in the marketplace.

Program Analysis and Improvement

To ensure a client's program fulfills its purpose, we go beyond policy design to identify process improvement, cost savings, opportunities for improved efficiencies and 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 a client's own relocating employees) to ascertain the effectiveness and competitiveness of a client's program. We then make recommendations and conduct trainings for all client stakeholders accordingly.



TECHNOLOGY

We have built our relocation management platform, BristolElite, on Equus's AssignmentPro. Because of this, we are in the unique situation where we own, maintain, and develop our technology platform ourselves, but we also benefit from Equus's 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, 24/7/365.

Client Move Management Platform

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

Relocating Employee Platform

BristolElite offers relocating employees move tracking and monitoring. A "What's Happening" view displays a timeline of events, dates, and important information associated with those dates to prepare employees for upcoming move milestones. Relocating employees also benefit from the ability to provide access to multiple delegates, exchange and sign documents, provide real-time feedback on how they feel the move is going, submit expenses and 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 24/7/365 smartphone access to the platform, allowing them to view real-time key details and dates on services, review policy information, submit expenses with uploaded photos of receipts, and contact their Mobility Advisor.

Reporting

Bristol's information management system, BristolElite, serves as the platform for all reporting, tracking, and monitoring. BristolElite captures over 13,500 different data points including numerous chronological and financial metrics that define the relocation plan and track ongoing performance. Bristol provides more than 35 standard reports such as budget versus actuals, active caseload, client expense detail, and approved/denied exceptions. Clients also have the ability to create custom and ad hoc reports that are available to them at any time in BristolElite. There is virtually no limitation to the types of reporting that can be created through the system. During the implementation process, we work with our clients to determine which of the 13,500 fields are critical for them and classify each of the required fields as "mandatory" so that we ensure that we are gathering any and all information that could be required in future report requests.

Predictive Analytics

Through IBM Cognos Analytics, we will provide an added layer of reporting and the ability for client users to not only review historical program data but also use the data to analyze future trends with accompanying data visualizations.

Virtual IBM Watson Assistant

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 on getting started with a move, expenses, and more.



RELOCATION SERVICES: GETTING STARTED

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 coordination who is accountable for ensuring a successful move for the relocating employee by guiding them through consistent touchpoints while liaising with and managing BristolNet supplier-partners who are responsible for delivering on-the-ground services.



Candidate Assessment and Selection

Bristol assists clients in determining whether a relocating employee (and their partner) are 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 prospective assignee/transferee and their partner examine the timing and fit of the move so that they—and the client—are able to make an informed decision about their readiness and likelihood of relocation/assignment success.



Pre-decision Assistance

Bristol offers a one-on-one pre-decision consultation call with a Bristol Mobility Advisor prior to an individual's acceptance of a relocation or hire. The Mobility Advisor reviews the approved policy benefits and Bristol's role in the process to set expectations and address questions or concerns. The Mobility Advisor also provides value-added destination information and tools to sell the new location while being able to ask in-depth questions that an employer may be unable to ask. We also schedule travel and area tours (for individuals or as part of a group move).



Relocating Employee Counseling

The Bristol Mobility Advisor provides the relocating employee with an understanding of applicable relocation benefits and services per the client's policy.



Relocating Employee Needs Assessment

A Bristol Mobility Advisor conducts an in-depth needs assessment 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 the 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 the familial belongings and family members involved—and we devote the time and attention to each relocating employee as their outlook and circumstances warrant.

VIP Services

In the same way that the Bristol Mobility Advisor guides a relocating employee, a highly experienced and tenured Senior Mobility Advisor will do this for the VIP and involved suppliers with touchpoints that are completely 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 Bristol 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, concierge pick-up and escort assistance at the destination location, and more.

Elder Care Services

Bristol assists the relocating employee in determining the best solution for their elder care needs, providing guidance on whether the elder person should join the relocating employee or remain at the origin location in an elder care facility.

HOME SALE & DEPARTURE SERVICES

Bristol's home sale programs offer optimum flexibility in balancing cost considerations, risk, and employee benefits.

Buyer Value Option (BVO) Home Sale Program*

The BVO reduces a client's overall tax liability (due to gross up) with a client absorbing the risk of home ownership by having Bristol first purchase the home at the price determined by an outside buyer's offer and then selling the home to the outside buyer at the agreed price.

Fixed Fee Buyer Value Option (FFBVO) Home Sale Program*

Our FFBVO eliminates the risk of homes entering inventory and reduces a client's overall tax liability due to gross up.

Appraised Value Sale (Guaranteed Buyout Offer) Home Sale 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.

Amended Value Sale (Guaranteed Buyout Offer) Home Sale Program*

Once the home's purchase price is determined by the average of two appraisals, Bristol manages listing it for sale and then amends the appraised value offer to match the purchase price offered by an outside buyer.

Direct Reimbursement Sale Home Sale Program

Bristol audits the final closing statement for normal and customary closing costs and reimburses the relocating employee for related expenses. Typically, these include real estate commission at the prevailing local rate (up to a maximum of 6%); attorney's fees as required for closing services only; normal costs for abstracting, title insurance, release/re-conveyance fees, document stamps, and recording fees; and state/local transfer taxes and revenue stamps related to the property's sale. This is a taxable event to the employee that a client may decide to gross up.

Inventory Management*

Bristol's dedicated team of Real Estate Specialists (RES) 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.

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.

Title and 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.



Bristol Home Rewards*

For lump-sum-only or non-sponsored relocating employees buying or selling homes in the United States, Bristol's complimentary program assists with household goods shipment, home sale, home purchase, hotel stays, and corporate housing. The program provides real estate and mortgage cost savings with either a credit at closing or cash back to the employee.



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.



Home-country Departure Services

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

We also offer auto disposal where we assist with the disposal of cars in the home location and reimburse an employee's claim for loss on auto sale.




MOVING SERVICES




Household Goods Move Management

Bristol coordinates the moving of a relocating employee's household goods from origin to destination in accordance with a client's policy and host-country immigration and customs requirements (if applicable). We provide counseling and support to the relocating employee throughout the process.




We maintain relationships with multiple supplier-partners in all markets allowing us to choose the best match (based on price, geographic coverage, service scores, etc.) for each individual move. Working as a client's 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.



Bristol utilizes a technology through our partnership with 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 10-20%.



Insurance Coverage



We offer standardized insurance programs through an independent global provider who specializes in the relocation industry and extends a broad-based coverage program at low costs.



Claims Management

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.



Household Goods Storage

Through our network of household goods partners, we offer short- and long-term storage options including temperature-controlled facilities.



Discard and Donate

The Bristol 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 set up so that it is cost neutral to clients, but the overall result ends up saving them money.

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 and permits, government and consulate validation, customs clearance, and any required quarantine.

Vehicle (Auto) Shipment

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



DESTINATION SERVICES



Local Area Orientation/Preview Trip

Bristol provides the relocating employee with an orientation tour of the destination location. This can be used as an opportunity to showcase a location to an employee who is considering whether to accept the relocation, it can be used to help a relocating employee decide on the neighborhood to purchase in, or it can be used to provide an employee with an extensive tour of the city once they have relocated.



Travel Assistance

Our all-in-one travel solution offers relocating employees personalized support through the Bristol Mobility Advisor and cutting-edge technology through American Express Global Business Travel (GBT) to book and manage the best travel experience. The solution enables Bristol to identify cost-savings opportunities, support a client's travel provision, provide comprehensive reporting, and decrease the complexities of managing business travel.



Hotel Stays

Bristol partners with HotelEngine 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 inns to popular brands.



International Home Finding

Bristol assists the relocating employee in selecting and securing a residence in their destination location. Our program includes an introduction to an experienced home search agent, screening and selection of available properties, arranging of 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 in order to secure rental properties in the destination location. Furthermore, Bristol can also pay 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 on housing, communities, schools, and more. The Bristol Mobility Advisor stays closely connected to the agent and employee and will provide guidance through the selection process and negotiation, screen and 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.



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.

Mortgage Assistance*

We offer BristolNet mortgage lenders for both home sale and purchase services and can also integrate any client-preferred lenders for recommendation to the relocating employee. Our lenders have provided relocation solutions to corporations for decades and have the resources to ensure compliance with the rapidly evolving regulatory landscape. They also offer the ability to work with international buyers to establish credit to purchase a home in the new location. If the relocating employee does not use our mortgage provider, the Mobility Advisor can answer any questions regarding policy or status with home sale while the employee's purchase transaction is in the processing or underwriting stages.

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 short-term rentals and long-term residence options and review these with the relocating employee to select a temporary living facility in accordance with personal preference and client policy.



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 (if 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 that allows for a limitless amount of time available to view 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.



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 in 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.



Settling-in Support

We support relocating employees and families settling in to their new location by offering support with car registration and driver's license application; medical services registration (e.g., doctor, dentist); opening bank accounts; and set up of cable/internet, telephone, and utilities. We also provide literature, emergency numbers, contact information of embassies/consulates; review shopping, worship centers, the healthcare system, networking, and local compliance requirements (e.g., social security registration; council tax).



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 to deliver (and install, as applicable) rented items.



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 that enables families to acclimate with their new community prior to their move. It also connects users based on interests, passions, and goals, and features community groups through which the relocating employee can create connections and attend events.

Ongoing Assignment Support

Bristol provides tracking and reporting of ongoing assignment expenses including expense reimbursements and payments of allowances, per diems, household goods storage invoices, and schooling. The Mobility Advisor makes monthly check-in calls once the relocation has completed and the assignment timeline commences in order 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

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

Tenancy Management

Our program assists the relocating employee with the management of the property in the host country throughout their tenancy. Bristol handles liaising with the landlord/managing agent (as necessary) and all the administration including lease and renewal negotiations, timely rental payments, tracking of lease termination and notification to landlord on termination, inventory check-in and check-out coordination, review of any dilapidations costs, and return of security deposits.

Lease Assistance

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



TRANSITION ASSISTANCE

Visa and Immigration Support

Through our supplier-partners, we offer a streamlined and highly cost-effective solution for passports, visas, work permits, and residence permits. Bristol offers assistance of all types and through all stages 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 counselling to ensure that the immigration process is completed in the most efficient manner possible.



Government Compliance

As part of our destination services package, the relocating employee is provided a compilation of the local registration and government requirements faced in living and working in a new country.



Cultural Training

In collaboration with our BristolNet supplier-partners, we offer an array of cultural training programs including self-paced online (that can also come with virtual or in-person, face-to-face support), a face-to-face or virtual trainer who covers the behavioral adjustments required to operate in the host country culture, and programs for youth/children. Trainings are designed to assist the relocating employee and family to attain a suitable level of knowledge and readiness for key cultural expectations for the host country.



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



Through our partnership with World Trade Resource (WTR), we are also 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.



Diversity, Equity, and 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 themselves in a diverse and inclusive global society by examining DE&I and culture shift.

Language Training

With our focus 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, depending on a client's policy parameters. Because the service is convenient, relocating employees are less likely to miss lessons, thereby ensuring that clients obtain the maximum return on investment in the service.

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, pre-researched job links, and more.



U.S. Location Information Tool (NeighborhoodScout)

All mobility program stakeholders and relocating employees will 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.



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.



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 [WTR]).

Information relevant to mobility program stakeholders ranges from market trend analysis, labor market and compensation survey data, travel tax calendars, site selection and 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), ongoing live support for every location, and more.

Information relevant to relocating employees ranges from country guides, location guides, rental practices, transportation, medical, safety, business etiquette, applications for social security number, opening a bank account, and more.




GLOBAL ASSIGNMENT & COMPENSATION SERVICES




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 and updates, payroll reporting, compensation accumulation, year-end total compensation reporting and more, accompanied by ongoing communication with client HR and payroll departments, external tax providers, and assignees themselves. Individual services are detailed below.



Assignment Letter/Repayment Agreement




Bristol may take charge of the preparation of formal assignment letters, which outline all the terms and conditions of the international assignment. We work with clients to develop the letter templates and customize the letter per client policy and the particulars of each individual assignment. Terms and conditions in the letters typically include expected assignment duration, compensation elements (e.g., base salary, bonus, G&S, housing; foreign service and hardship premiums, tax equalization methodology, automobiles), 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 should the employee terminate 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 client policies are explained. Schedules of payments to set employee expectations are also discussed. Bristol can share compensation-related worksheets (or “balance sheets”) 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 element of compensation and relocation including hypothetical calculations for taxes in both the home and host location depending on the assignment type, custom-tailored to a client’s unique policy.

We also offer a free self-service tool, Pre-Planning Cost Estimate (Equus’s “What-If” Cost Estimates), in BristolElite for clients to quickly create and view the financial impact of a hypothetical assignment scenario. Reports are available to compare costs of hypothetical scenarios, view the cost estimate details, or review and audit the hypothetical tax calculations, if necessary.

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, etc. Depending on the client’s 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.



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 for clients to view these reporting details within BristolElite.



Bristol prepares a final, thorough, and accurate year-end Global Statement of Earnings (GSOE) for each assignee that is ultimately delivered to the client's third-party tax provider who will in turn ensure compliant and accurate filing to worldwide tax authorities.



Bristol's year-end reporting and GSOE can be configured to define what has been paid, in what currency, and when and whether it was paid by home or host payroll or AP, an external partner like travel, immigration or tax, or through the relocation or assignment process (or the RMC). All this information is crucial for our client's tax partner to ensure accuracy and compliance and provide complete details in order to finalize tax equalization, payments, and W-2/T4/P60, etc., 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 client's 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.



Ongoing Payment Support

Our global compensation team is expert in administering ongoing housing allowances and/or paying rent and utilities directly on behalf of a client's assignees in accordance with the client's administrative needs along with tracking and reporting for tax compliance purposes.

Tax Support and Coordination

Bristol provides a suite of tax-related services ranging from tax briefing and return services to equalization and social insurance enrollments (or totalization agreements). We seamlessly integrate a client's tax partner into our system, and we then easily push and pull real-time data from those tax partners, and all our system's normal reporting, workflow, and automation functionality are available to the client and Bristol.

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 throughout the life of or phase of an assignment. Bristol can produce these calculations through Equus's own proprietary calculation, the client's 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.

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