

RELOCATION PAMPHLET FOR TRANSFEREES

(This pamphlet contains information on relocation entitlements and NOAA's Home Sale/Home Purchase Programs)

Are you relocating for the Government? If you are, please take note of the following important information:

1. Contact your servicing Relocation Services Coordinator (RSC) below immediately upon notification!
2. Provide your servicing RSC at least 2 weeks notice when moving your household goods.

Telephone Numbers for NOAA's RSCs

Transferee's New Duty Station Serviced by: Telephone Number

Eastern Administrative Support Center (EASC) (757) 441-6527

Central Administrative Support Center (CASC) (816) 426-7543x418

Mountain Administrative Support Center (MASC) (303) 497-6199

Western Administrative Support Center (WASC) (206) 526-4426

NOAA Finance Office (Wash., D.C., Metro. Area) (301) 444-2155 or
(301) 444-2136

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SUMMARY OF RELOCATION REIMBURSABLE EXPENSES

*IN LIMITED CIRCUMSTANCES **ALSO NON-TEMPORARY STORAGE ***MAY INCLUDE AUTO

RELOCATION CATEGORIES BASIC ENTITLEMENTS	NEW APPOINTEES - 1 ST DUTY STATION		GOVERNMENT EMPLOYEES TRANSFERRING	SHORT DISTANCE TRANSFERS/ METROPOLITAN MOVES	NON-FOREIGN OVERSEAS ASSIGNMENTS	
	APPROVED POSITIONS, SES LAST MOVE HOME, SHORTAGE CATEGORY, STUDENT TRAINEE, CERTAIN PRESIDENTIAL APPOINTEES	OTHERS			NEW EMPL	TRANSFEREES
COMMERCIAL TRANSPORTATION OR MILEAGE ALLOWANCE FOR: EMPLOYEE	YES	NO	YES	YES	YES	YES
.....IMMEDIATE FAMILY	YES	NO	YES	YES	YES	YES
PER DIEM ENROUTE EMPLOYEE	YES	NO	YES	NO	YES	YES
.....IMMEDIATE FAMILY	NO	NO	YES	NO	NO	YES
TRANSPORTATION OF HOUSEHOLD GOODS	YES	NO	YES	YES	*** YES	*** YES
TEMPORARY STORAGE OF HOUSEHOLD GOODS	YES	NO	YES	NO	** YES	** YES
TRANSPORTATION OF MOBILE HOME	YES	NO	YES	YES	*	*
HOUSE-SEEKING AND TEMPORARY QUARTERS	NO	NO	YES	NO	NO	NO ----- YES
REAL ESTATE EXPENSES (INCL 3 RD PARTY RELO)	NO	NO	YES	YES	NO	*
RELOCATION INCOME TAX ALLOWANCE (RITA)	NO	NO	YES	YES	NO	YES
MISCELLANEOUS EXPENSES	NO	NO	YES	YES	NO	YES

PERMANENT CHANGE OF STATION MOVE ENTITLEMENTS

The following is a brief summary of entitlements that may be reimbursed in connection with a permanent change of station (PCS) move. **This summary covers employees currently working for the Federal Government transferring a distance of 50 miles or more within the Department of Commerce.** If you do not fit into this category or if you are a member of a family in which two or more federally employed members are transferring to the same duty station, or duty stations in close proximity, please contact the person listed on the cover sheet of this package.

Generally, all travel, including that for the immediate family, and transportation, including that for household goods, allowed under the Federal Travel Regulations shall be accomplished as soon as possible. The maximum time for beginning allowable travel and transportation shall not exceed two years from the effective date of the employee's transfer or appointment. Upon an employee's written request due to extenuating circumstances, the two-year period may be extended for an additional two year period, not to exceed a total period of four years for completion of residence transactions. A memorandum of request must be submitted through the Management and Budget Office, to the Assistant Administrator or Director, Staff Office, for approval.

Transferees must not incur any expenses or enter into any agreements until a CD-29, Travel Order, is properly approved.

1. HOUSE-HUNTING TRIP

A house-hunting trip is not allowed under the following circumstances:

- (1) When an employee will be assigned to Government or other prearranged residence quarters at the new official station; or
- (2) When the employee has not yet formally agreed to transfer to the new station; or
- (3) When the map distance between the old and new stations is less than 75 miles via a usually traveled surface route.
- (4) When either the old or new duty stations, or both, are located outside the United States (Alaska and Hawaii qualify for house-hunting trips.)

Payment of travel and transportation expenses is allowed for an employee and spouse traveling together, or the employee or spouse traveling individually (other dependents are not entitled to a house-hunting trip), for one round trip each between the old and new official stations to seek permanent residence quarters, if authorized by an appropriate official. The trip is limited to 10 calendar days, including travel time. **NOTE: Common carrier travel must be purchased with a Government travel charge card. Do not use personal funds, i.e., cash, personal check, personal credit card, etc.**

For purposes of PCS entitlements "immediate family" includes the employee's spouse, unmarried children of the employee or spouse who are under 21 years of age or who, regardless of age, are physically or mentally incapable of self-support (this same criteria may also apply to dependent brothers and sisters). "Children" include natural offspring, step children, adopted children, grandchildren, legal minor wards, or other dependent children who are under legal guardianship of the employee or spouse. Dependent parents may also be included as members of the immediate family. "Dependent" assumes at least 51% support by the employee.

The employee is on duty status while on the house-hunting trip. FTR 302-4.17. Personal phone calls home while on a house hunting trip are authorized when approved by the authorizing official. Reimbursement for rental vehicle costs and associated fuel expenses in and around the new duty location are authorized when approved by the authorizing official.

Separate round trips by the employee and spouse may be allowed provided the overall cost to the Government is limited to the cost of one round trip for the employee and spouse traveling together. The allowances are:

- (1) Round-trip transportation for employee and spouse or a mileage allowance as shown below when POV (privately-owned vehicle) is authorized.

Number of occupants in POV:

Employee	15 cents
Employee and Spouse	17 cents

- (2) Per diem for a maximum of 10 days for employee and spouse. (See Travel to New Post of Duty below for computation of per diem for employee and spouse.)

The applicable per diem rate for house hunting trip within CONUS is the locality rate as prescribed under FTR 301-11.6. Approving officials may prescribe the standard CONUS rate if it determines that establishment of such lower rate is advantageous to the Government. This rate, locality or standard, should be stated on the travel order. (Effective 12/27/96)

NOTE: Contact the authorizing official to determine if a house-hunting trip will in any way affect your eligibility or length of temporary quarters. Some offices will reduce the number of temporary quarter days by the number of days taken for a house-hunting trip. Generally, the taking of a house-hunting trip will greatly reduce, or avoid altogether, the need for temporary quarters.

2. TRAVEL TO NEW POST OF DUTY

a. Lower 48 states en route per diem.

(1) Per diem is based on the basis of actual time used to complete the trip. If the traveler does not drive an average of 300 miles per calendar day, the per diem will be reduced.

(2) Per diem en route: Per diem allowances for employee while en route will be based on the single night lodging rate not to exceed \$55 plus \$31 M&IE, with the daily amount not to exceed \$86 per day.

On the day of departure and the day travel ends, the M&IE rate shall be three-fourths of the applicable per diem rate. (effective 12/27/96)

When the spouse accompanies the employee, he/she will be entitled to 3/4 of the per diem rate to which the employee is entitled. Also, each member of the employee's immediate family 12 years or older, accompanying the employee, will be entitled to 3/4 of the per diem rate authorized for the employee, and for each child under 12 years of age, 1/2 of the per diem to which the employee is entitled.

Per diem is not allowed when the total travel period is 12 hours or less within the same calendar day. When the travel period is more than 12 hours, but less than 24 hours, and lodging is not required, the per diem allowable for the employee will be three-fourths of the applicable per diem rate. (effective 12/27/96)

- b. **Outside the lower 48 states en route per diem.** The rules for determining PCS per diem entitlement for outside the lower 48 states travel are the same as for temporary duty travel addressed in the Federal Travel Regulations. Any portion of the travel performed within the lower 48 states is subject to the rules defined above.

- c. **Privately owned vehicle.** Only one privately owned vehicle (POV) can be authorized except under the following circumstances:
 - (1) If there are more members of the immediate family than can reasonably be transported with luggage in one vehicle; or
 - (2) If because of age or physical condition, special accommodations are necessary in transporting a member of the immediate family in one vehicle and a second automobile is required for travel of other members of the immediate family; or
 - (3) If an employee must report to the new official station in advance of travel by members of the immediate family who delay travel for acceptable reasons such as completion of school term, sale of property, settlement of personal business affairs, disposal or shipment of household goods, and temporary unavailability of adequate housing at the new official station; or
 - (4) If a member of the immediate family performs unaccompanied travel between authorized points other than those for the employee's travel; or
 - (5) If, in advance of the employee's reporting date, immediate family members must travel to the new official station for acceptable reasons such as to enroll children in school at the beginning of the term.

Mileage allowances are as follows:

<u>Occupants of Automobile</u>	<u>Mileage Rate (cents)</u>
Employee only, or one member of immediate family	15
Employee and one member, or two members of immediate family	17
Employee and two members, or three members of immediate family	19
Employee and three or more members, or four or more members of immediate family	20

3. TRANSPORTATION AND TEMPORARY STORAGE OF HOUSEHOLD GOODS

The General Services Administration (GSA) has instituted a centralized Household Goods Traffic Management Program. Under this program, GSA will provide agencies with a list of carrier selections and routes for domestic moves based on cost comparisons between the commuted rate and the actual expense method.

The net weight of household goods and personal effects which may be transported at Government expense may not exceed 18,000 pounds. Charges for weight in excess of 18,000 pounds must be paid by the employee.

- a. **Actual Expense Method.** Under the actual expense method, more commonly called Government Bill of Lading (GBL), the Government assumes responsibility for negotiating and awarding contracts to carriers, assists in filing loss and damage claims, and auditing/paying the transportation claims. Your agency's Transportation Officer or your servicing ASC Transportation Officer will coordinate with you in making the arrangements with the carrier.

If you are authorized the actual expense method but choose to move yourself, reimbursement will be limited to the actual costs incurred (e.g., truck rental,

material handling equipment, packaging materials, gasoline, tool charges, etc.), supported by receipts, not to exceed the maximum amount that would have been paid on the GBL. Official weight certificates establishing the gross and tare weight will be required along with all receipts for the actual expenses when submitting the travel voucher for payment.

b. **Commuted Rate Method.** Under the commuted rate system, the employee makes the carrier selection and arranges for transportation and storage. The employee pays the costs and files for reimbursement, which is based on the Commuted Rate Schedule. The employee must provide a bill of lading and weight certificate for services provided by the commercial carrier or a weight certificate showing gross and tare weight of the vehicle when rental trucks/trailers are used. **Once again, this method of moving your household goods must be authorized in advance by your agency. Do not make the assumption that you have the authorization until you have received travel orders clearly specifying the commuted rate method.**

c. **Temporary Storage.** In addition to the allowance for transportation of household goods and personal effects, a transferred employee is entitled to temporary storage of the transported goods. Maximum time allowable for temporary storage is limited to 90 days. However, under certain circumstances, this initial 90-day period may be extended with proper approval by an additional period not to exceed 90 days.

4. **NON-TEMPORARY STORAGE OF HOUSEHOLD GOODS**

a. **Lower 48 states.** Non-temporary Storage (storage in excess of 90 days, or 180 days if authorized) of household goods is reserved only for those individuals assigned to locations within the lower 48 states that have been designated as isolated official stations by the head of the Bureau. An isolated official station is a place of permanent duty assignment at which an employee has no alternative except to live where he/she is unable to use their household goods because:

- (1) The type of quarters the employee **is required** to occupy will not accommodate the household goods, or
- (2) Because of size and other characteristics of each employee's immediate family, residence quarters which would accommodate the household goods are not available within reasonable daily commuting distance of the official station.

b. **Outside the lower 48 states.** Non-temporary storage may be allowed for those individuals stationed or transferred to an official station other than one located in the lower 48 states under the following conditions:

- (1) The official station is one to which the individual is not authorized to take or at which they are unable to use the household goods; or
- (2) The storage is authorized in the public interest; or
- (3) The estimated cost of storage would be less than the cost of round trip transportation (including temporary storage) of the household goods to the new official station.

5. **SHIPMENT OF PRIVATELY OWNED VEHICLE**

a. The transportation of **one privately owned vehicle** which is in the possession of and used by the employee or his/her immediate family for the primary purpose of providing personal transportation may be approved under the following conditions:

Authorized as being in the interest of the Government for the employee to have the use of the vehicle and only if all of the following conditions are present:

- (a) Use of POV contributes to effectiveness in the job and is not primarily for convenience of the employee or immediate family.
 - (b) Local conditions make it desirable from the Government's viewpoint for the employee to have use of a POV.
 - (c) Type of POV is suitable for the local conditions of the official station.
 - (d) Cost of shipping to and from official duty station is not considered excessive considering agreed period of service at that location.
- b. **Restriction of vehicle types.** Vehicles that may be transported include passenger automobiles, station wagons and certain small trucks or other similar vehicles which may be used primarily for personal transportation and considered as appropriate for use in the area of assignment. Trailers, airplanes, or vehicles intended for commercial use are prohibited.
- c. **Size limit.** Limited to vehicles having a gross size of not more than 20 measurement tons (800 cubic feet). Shipment of a larger vehicle may be authorized if it otherwise qualifies, but the employee bears the additional expense.
- d. **When it is feasible to drive a vehicle.** When a privately owned vehicle may be driven on hard-surfaced, all weather highways, using ferries as necessary, for all or part of the distance between origin and destination, the authorizing official may determine that it is reasonable to expect the employee or a family member to drive the privately owned vehicle for that distance. In case of such a determination, the Government will pay transportation charges to the extent driving the privately owned vehicle was not required.
- e. The use of a rental vehicle while waiting for delivery of POV is not reimbursable.

6. TRANSPORTATION OF MOBILE HOMES AND BOATS

An employee who certifies that a mobile home or boat is for use as a permanent residence at the new duty station and who would otherwise be entitled to transportation of household goods is entitled to an allowance for the transportation of that mobile home or boat. The total allowance shall not exceed the maximum entitlement for transportation and 90-days temporary storage of household goods. There is no additional allowance for a separate shipment of household goods.

MOBILE HOME

The mobile home may be transported by the Government via GBL, by a commercial carrier hired by the employee or towed by the employee with a privately owned vehicle. In all cases, allowable mileage is determined by standard highway mileage guides, unless any substantial deviations are satisfactorily explained. If the employee elects to tow the mobile home, an allowance of 11 cents per mile shall be made as reimbursement for all transportation costs, including ferry fares, tolls, and similar charges. In addition, costs of preparing a mobile home for movement and resettling it at the destination may be reimbursed. No other allowance shall be made for transportation of the mobile home under this part, but payment of the mileage allowance for use of a POV may be made in addition to the 11-cent allowance.

If the trailer is towed by a commercial transporter, you may be allowed the carrier's charges for actual transportation of the mobile home in an amount not exceeding the applicable approved tariffs for movement of a mobile home of its size and type for the distance involved. In addition, you will also be allowed ferry fares; and bridge, road, and tunnel tolls; taxes, charges or fees fixed by a state or municipal authority for permits to transport mobile homes in or through its jurisdiction; carrier's service charges for obtaining necessary permits; and charges for a pilot (flag) car or escort services, when such services are required by state or local law.

You are not allowed costs for replacement parts, tire purchases, structural repairs, brake repairs, or any repairs or maintenance performed; storage expenses; insurance for valuation of mobile homes above carrier's maximum responsibility; charges designated in tariffs as "Special Services" as part of the transportation expense; or costs of connecting and disconnecting appliances, equipment, and utilities involved in the relocation of mobile homes.

Allowable expenses (when mobile home is transported by GBL or commercial carrier):

- a. Transportation charges;
- b. Ferry fares/tolls;
- c. Cost of permits;
- d. Carrier's charge for obtaining permits;
- e. Rental fee for temporary lights; and
- f. Fees for pilot or escort vehicle.
- g. Costs of preparing a mobile home for movement and resettling it at the new destination, including:
 - (1) Costs of blocking and unblocking;
 - (2) Labor costs of removing and installing skirting;
 - (3) Costs of separating, preparing, sealing, and reassembly of each section; and
 - (4) Travel lift fees.

BOAT USED AS PRIMARY RESIDENCE

When a boat used as a primary residence is transported over water, an allowance for transportation costs shall include the following:

- a. Cost of fuel and oil used for propulsion of the boat;

- b. Cost of pilots or navigators in the open water;
- c. Cost of a crew;
- d. Charges for harbor pilots;
- e. Cost of docking fees incurred in transit;
- f. Harbor or port fees and similar charges relating to entry in and navigation through ports; and
- g. Cost of towing, whether in tow or towing by pushing from behind.

7. **SUBSISTENCE WHILE OCCUPYING TEMPORARY QUARTERS**

An administrative determination as to whether the occupancy of temporary quarters is necessary and the length of time for occupancy shall be made on a case-by-case basis. Temporary quarters and the length of time for occupancy shall be authorized in advance on the travel order. The travel order must be amended to authorize all extensions of time in temporary quarters. Justification for allowing temporary quarters at other than the old and/or new official station must be shown on the travel order. For help in locating temporary quarters, you may either contact your servicing RSC or **Cendant Mobility, Government Relocation Information Center, 40 Apple Ridge Road, Danbury, CT 06810, 1-877-332-7356.**

- a. Subsistence expenses for the employee and each member of the employee's immediate family may be authorized for a period of not more than 60 consecutive days. For any day that the employee or any member of the immediate family occupies temporary quarters, a day of entitlement has expired for the employee and all family members. Up to 60 days may be authorized by the Travel Order authorizing official.
- b. Temporary quarters in excess of 60 days for compelling reasons beyond the employee's control, and acceptable to the agency, may be authorized by the bureau head or the head of an operating unit or his/her designee. The total period of time in temporary quarters shall not exceed 120 days under any circumstances. Generally, economic conditions or the inability to sell a residence are not sufficient reasons to extend the temporary quarters beyond the original 60 days.

- c. **Itemization and receipts.** The actual expenses incurred while occupying temporary quarters shall be itemized on Form CD-372, Expense Record for Temporary Quarters. The CD-372 must be attached to the CD-370, Travel Voucher. Allowable subsistence expenses include meals, lodging, fees and tips incident to meals and lodging, laundry, and cleaning and pressing of clothing. Receipts are required for all lodging expenses and for laundry and cleaning expenses, except when coin-operated facilities are used.
- d. When the temporary lodging is obtained from friends or relatives, the details (dates and locations) must be shown on the CD-372, whether or not payment is made. If payment of rent is made to friends/relatives, the amount must be reasonable. It must be directly related to the actual additional incremental costs incurred by the friend/relative providing lodgings to the employee, and be considerably less than commercial rates. What is reasonable depends on the circumstances. Factors to be considered include the number of individuals staying with the friend/relative and whether the friend/relative hired extra help. The burden is on the employee to supply the necessary information. It is not sufficient to show merely that the amount claimed is less than commercial rates or the maximum allowable. Despite per diem allowances, meal costs must be reasonable. Employees occupying temporary quarters are expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business.
- e. **Maximum reimbursement.**
- The maximum which may be reimbursed for temporary quarters subsistence expenses shall be the actual amount of allowable expenses incurred for each 30-day period or portion of the 30-day period that temporary quarters were occupied not to exceed the maximum amount based on the applicable daily rate prescribed, multiplied by the number of days that temporary quarters were occupied. Expenses will be allowed to the extent they are determined to be reasonable.

- f. **Reimbursement limitations for temporary quarters in the lower 48 states are as follows** (for rates outside the lower 48 states, please contact the person listed on the cover sheet):

First 30-Day Period

Employee or spouse unaccompanied by employee	\$86.00
Accompanied spouse (3/4 of employee's daily rate)	\$64.50
Each other family member 12 years or older (3/4 of employee/unaccompanied spouse rate)	\$64.50
Each family member under 12 years (1/2 employee/unaccompanied spouse rate)	\$43.00

Second 30-Day Period and Additional 60 Days, if Authorized

Employee or unaccompanied spouse	\$64.50
Accompanying spouse	\$43.00
Each other family member 12 years or older	\$43.00
Each family member under 12 years	\$34.40

- g. **Transfer to foreign area.** When the new official station is located in a foreign country, the employee is not eligible for temporary quarters allowances under these regulations. When temporary lodgings are obtained in a foreign area or in the United States prior to transferring to a foreign country, the employee may be eligible for an allowance under the Standardized Regulations (Government Civilians, Foreign Areas) prescribed by the Department of State.

8. **MISCELLANEOUS MOVING ALLOWANCES**

- a. An allowance for miscellaneous moving expenses is payable for the purpose of defraying various contingent costs associated with discontinuing a residence at one location and establishing a residence at a new location. The allowance is \$500 or the equivalent of 1 week basic pay, whichever is the lesser, for an employee without an immediate family or \$1,000 or equivalent of 2 weeks basic pay, whichever is the lesser, for an employee with an immediate family. These amounts are paid without documentation.

- b. Allowances in excess of \$500 or \$1,000 may be authorized or approved, if supported by acceptable statements of fact and either paid bills or other acceptable evidence justify the amount. The aggregate amount may not exceed one week's basic pay for an employee without an immediate family or two weeks' basic pay for an employee with an immediate family. The amount authorized or approved cannot exceed the maximum pay of a GS-13. Documentation and/or receipts will be required for the entire amount claimed. Refer to FTR 302.3 for general information on what may or may not be claimed under this method.

If you are eligible to sell or buy a residence, you may chose one of two methods: (1) the conventional method where you market your residence and claim allowable expenses on a travel voucher, or (2) you may sign up for NOAA's home sale/home purchase.

9. SALE AND PURCHASE OF RESIDENCE

To be eligible for real estate reimbursement, the old and new official stations must be located within the 50 states, in the District of Columbia, the territories and possessions of the United States, the Commonwealth of Puerto Rico, or the areas and installations in the Republic of Panama made available to the United States under the Panama Canal Treaty of 1977.

The settlement dates for the sale and purchase or lease termination transactions for which reimbursement is requested are not later than two years after the date the employee reported for duty at the new official station. Upon an employee's written request, the two-year time limitation for completion of the sale and purchase or lease termination transactions may be extended by the head of the agency or his/her designee for an additional period of time not to exceed one year.

a. Reimbursable Real Estate Expenses Under Direct Real Estate Reimbursement.

Below is a partial list of items that can be reimbursed in connection with sale and/or purchase of a residence.

- (1) FHA or VA fee for the loan application.
- (2) Loan origination fees and similar charges such as loan assumption fees and loan transfer fees. A loan origination fee is a fee paid by the borrower to compensate the lender for administrative-type expenses incurred in originating and processing a loan. Reimbursement for a loan assumption fee or a loan transfer fee, or a similar charge, may also be allowed if it is assessed in lieu of a loan origination fee and reflects charges for services similar to those covered by a loan origination fee. An employee may be reimbursed for these fees in an amount not in excess of 1 percent of the loan amount without itemization of the lender's administrative charges. Reimbursement may exceed 1 percent only if the employee shows by clear and

convincing evidence that: (1) the higher rate does not include prepaid interest, points, or a mortgage discount; and (2) the higher rate is customarily charged in the locality where the residence is located.

- (3) Cost of preparing credit reports.
- (4) Mortgage and transfer taxes.
- (5) State revenue stamps.
- (6) Other fees and charges similar in nature to those listed above, unless specifically prohibited.
- (7) Mortgage title insurance policy paid for by the employee on a residence purchased by the employee for the protection of, and required by the lender.
- (8) Expenses in connection with construction of a residence, which are comparable to expenses that are reimbursable in connection with the purchase of an existing residence.
- (9) Attorney's fees when they are reasonable and customary. Legal fees arising from litigation on the sale or purchase of a residence are not allowed.
- (10) Broker's fees and real estate commissions on the sale only but not in excess of rates generally charged in the locality (i.e., no bonus percentages or incentive fees are reimbursable).
- (11) Title Insurance on sale of house.
Since closing costs vary, if you have a question on whether an item can be reimbursed, please contact the person listed on the cover sheet.

Expenses for the sale and purchase of residences must be listed on employee application for reimbursement of expenses incurred upon sale or purchase (or both) of residence upon change of official station (form CD-371). The form must be signed by the approving official. The form, closing papers and receipts must be attached to the travel voucher.

b. **Residence Transactions Reimbursement Limitations for Employees Whose Effective Date of Transfer is on or After March 22, 1997.**

(1) Sale: 10 percent of actual sale price.

(2) Purchase: 5 percent of the purchase price.

c. **Lease Breaking Expenses.**

Reimbursement of expenses may be authorized under the following conditions:

(1) Local or state laws provide for payment of lease breaking expenses.

(2) Terms of lease provide for payment (copy of lease agreement required).

(3) Evidence of payment is required (receipt or canceled check).

(4) Expenses cannot be avoided by subleasing. Employee must give prompt notice of lease termination in accordance with leasing agreement.

10. **Citibank Government Travel Card**

a. The Citibank Government Travel Card will be used to cover the cost of per diem, mileage, house-hunting trips, subsistence expenses while occupying temporary quarters, transportation, and storage of household goods if payment is not being made by a Government Bill of Lading (GBL).

- b. The Citibank Government Travel Card cannot be used for real estate or miscellaneous expenses.

11. **RECEIPTS**

Receipts will be required to support reimbursement on the travel voucher for the following items:

- a. For all lodging expenses.

Receipts are required on the following items only if they are for more than \$75.

- b. Meals consumed while occupying temporary quarters (if the employee is claiming more than 45 percent for meals and incidental expenses).
- c. Laundry and dry cleaning expenses except when a coin operated machine is used.
- d. Airline tickets if travel was by common carrier.
- e. Rental car and gasoline if used on a house-hunting trip.
- f. For real estate costs or unexpired leases, a copy of:
 - (1) Purchase agreement
 - (2) Sales agreement
 - (3) Loan closing statements
 - (4) Invoices or receipts for bills paid
 - (5) Lease agreement when claiming lease breaking expenses.

- g. If household goods are not shipped by Government Bill of Lading:
 - (1) Receipts for rental truck, etc.
 - (2) Receipts for gasoline
 - (3) Receipts for any other expenses in connection with the shipment.
 - (4) Weight certificates.
- h. for Miscellaneous Expense claims in excess of \$500 or \$1,000, receipts are needed for the entire amount.

12. REIMBURSEMENT VOUCHERS

- a. Reimbursement vouchers should be filed within 5 days after each segment of the relocation is completed and after each 30 days of temporary quarters. Applicable taxes will be withheld as required when vouchers are processed. These taxes include Federal, FICA, and Medicare. Your reimbursement will be made by electronic fund transfer directly to your bank account. Please keep your ASC Financial Management division informed of any changes to your bank account.
- b. Withholding Tax Allowance (WTA) will be calculated as each relocation voucher is processed. The WTA will be paid to offset the 27 percent Federal tax withholding * (not State withholding). This part of the process is automatic, requiring no action on the employee's part. You will receive a summary on Form CD-373, Change of Station Allowances and Taxes Withheld, for each voucher processed. This statement will include the amount of WTA that was added to the voucher. The WTA is an estimated partial payment of the Relocation Income Tax Allowance (RITA).
- c. At the beginning of the year (between January 1 and May 15) **after** the tax year in which you were reimbursed for relocation expenses, you **must** file a claim for the

RITA. (Note: you will receive a package from your servicing ASC Finance Office.) The RITA calculation will apply the estimated partial (WTA) payment(s) made and result in a final determination of the amount due the employee for a specific tax year. **In some cases, the estimated partial payment(s) (the WTA(s)) may exceed the Relocation Income Tax Allowance, and the employee will be required to reimburse the agency for the difference.** Claims for RITA should be filed by May 15 of the year following the calendar year (tax year) in which the relocation voucher(s) was paid. If a claim for the RITA is not filed by the due date, action will be taken to collect the total WTA (partial) payment(s) previously made to you. Please contact the Servicing ASC Finance Office for additional RITA information and/or any questions.

- d. NOTE: A delay in processing of PCS reimbursement vouchers may occur if vouchers are not submitted to a single point (MSC/ASC). Any and all vouchers for a PCS move will need to be sent to the site (MSC/ASC) of the first voucher. The first voucher is to be sent to the servicing site the employee is relocating to (e.g., if employee is moving from Washington, D.C. to Fort Worth, Texas, vouchers should be submitted to the Mountain Administrative Support Center (MASC). (MASC provides administrative services to Fort Worth.)

RELOCATION FORMS
(This page represents pages 22-26)

Pages 22-24 - "Request for Authorization of Travel and Moving Expenses", Form CD-150 (not available on-line at this time)

Page 25 - "Employee Application for Reimbursement of Expenses Incurred Upon Sale of Purchase or both) of Residence Upon Change of Official Station", Form CD-371

Page 26 - "Expense Record for Temporary Quarters", Form CD-372

NOAA' s HOME SALE/HOME PURCHASE PROGRAMS

The Department of Commerce (DOC) is a mandatory user of the contract for Government-wide relocation services issued by the General Services Administration.

The contract provides a basic package of relocation services for transferees, consisting of: (1) Voucherless Home Sale; (2) Voucherless Home Purchase; (3) Home Marketing Assistance (no cost); (4) Home Finding Assistance (no cost); and (5) Mortgage Counseling (no cost).

Effective October 13, 2000, NOAA offers authorized transferees the new Buyer Value Option (BVO), which begins on the first day of the transferee's listing agreement through day 60 of the agreement, subject to the Federal Travel Regulation (FTR) and DOC Travel Handbook, Chapter 302-12.

Effective October 13, 2000, NOAA offers authorized transferees, an optional voucherless **home purchase** process provided by the Cendant Mortgage at no additional brokerage fees to NOAA.

The name of the current contractor to offer these new services is **Cendant Mobility, Government Relocation Information Center, 40 Apple Ridge Road, Danbury, CT 06810, 1-877-332-7356.**

Note: NOAA will continue to offer the amended-value (over 60 days) and appraised-value (over 90 days) home sale processes (also known as the third-party relocation program) to authorized transferees, subject to the conditions as stated in DOC Travel Handbook, Chapter 302-12.5(d).

Telephone Numbers for NOAA's Relocation Services Coordinators (RSC)

<u>Transferee's New Duty Station Serviced by:</u>	<u>Telephone Number</u>
Eastern Administrative Support Center (EASC)	(757) 441-6527
Central Administrative Support Center (CASC)	(816) 426-7543x418
Mountain Administrative Support Center (MASC)	(303) 497-6199
Western Administrative Support Center (WASC)	(206) 526-4435
NOAA Finance Office (Wash., D.C., Metro. Area)	(301) 413-3060

1. ELIGIBILITY

An employee must meet the following conditions to be eligible for home sale and/or home purchase services:

- The employee's transfer from one official station to another is determined to be in the interest of the Government and is not primarily for the convenience or benefit of the employee or at the employee's request.
- The settlement date for the sale transaction for which the relocation services are rendered is not later than 2 years after the date that the employee reported for duty at the new official station. Upon an employee's written request due to extenuating circumstances, the two-year period may be extended for an additional one year period, not to exceed a total period of three years for completion of residence transactions. A memorandum of request must be submitted through the Management and Budget Office, to the Assistant Administrator or Director, Staff Office, for approval.

The following employees are **not** eligible for home sale and/or home purchase services:

- New appointees, including new appointees to shortage category positions, new appointees to the Senior Executive Service positions and Presidential appointees.
- Employees assigned under the Government Employees Training Act.
- Employees assigned or transferred to a post of duty in a foreign area and are returned to former non-foreign area official station (see FTR, Chapter 302-6 which defines "former non-foreign area official duty station").
- Foreign Service Officers and members of the National Oceanic and Atmospheric Administration (NOAA) Corps.
- Homes that are uninsurable, mobile homes, cooperatives, and houseboats are not covered under this program.

2. Initial Paperwork required by the transferee

- After receiving notification of their required report date, the transferee will **immediately** complete the Form CD-150, Request for Authorization of Travel and Moving Expenses (copy attached), and forward it to the gaining office to initiate preparation of their Form CD-29, Travel Order. The travel order must indicate the following special approval: "Contractor Relocation Services Authorized" in order to use NOAA's home sale and/or home purchase services. The travel order should not be used to obligate funds for real estate expenses since funds will be obligated under a CD-404. **Transferees must not incur any expenses or enter into any agreements until a CD-29, Travel Order, is properly approved.**
- The Form CD-150, CD-29, the listing agreement which includes an exclusion clause, and Third Party Eligibility Questionnaire (copy attached) must be faxed to the transferee's servicing RSC.
- After notification by the RSC, the contractor will contact the transferee within 48 hours to begin the home sale and/or home purchase process and provide the transferee with relevant information and counseling. Employees are welcome to call The Government Relocation Information Center help line on 1-877-332-7356.

3. Home Sale Benefits for the Transferee

- Elimination of the requirement to submit a travel voucher for closing costs associated with the sale of the home.
- Receipt of the contractor's guarantee of the sale prior to closing, therefore transferees are not at risk if the sale of their home does not close. Finding a replacement buyer is the contractor's responsibility.
- Offers based on the price negotiated between seller and buyer rather than on appraised value of the home.
- Access to objective advice from the contractor on marketing their home, selecting a real estate agent, setting the list price, and oversight of marketing activities and negotiation assistance.
- Optional selection of any real estate agent or selection of an agent from the contractor's network of brokers.
- Advance receipt of 95% of their home's equity once the contract with the contractor is executed and, when their home is vacant, 100% of the equity.
- Elimination of the transferee's responsibility for mortgage payments, utilities, or maintenance after their home is vacated.
- Elimination of the need for the transferee to attend closing.
- Elimination of the tax liability.
- No fee equity loan up to 95% based on appraised value offer.

Home Sale Program

The voucherless home sale process begins with marketing assistance on day one of the listing agreement and concludes with closing of the sale of the home. The contractor will make the transferee an offer if a bona fide buyer is not found within 90 days. Transferees may choose their own real estate agent or choose from a list of agents provided by the contractor. With either option, the contractor will work with the transferee and real estate agent as directed by the transferee.

1) **If the transferee receives an outside offer (Buyer Value Option or Amended Sale)**, the contractor will purchase the home for the amount of the outside offer once inspections are completed.

- Once the home is listed with an agent, the transferee will fax the listing agreement accompanied by an exclusion clause (copy attached) to the RSC.
- The transferee should not sign or initial the buyer's offer, but should forward the contract to the contractor for signature.
- The transferee does not attend settlement. The contractor will manage the details of settlement including payment of commissions.
- Once the home sale contract with the contractor is executed, the transferee will receive 95% of the equity, and 100% of the equity once the house is vacated.
- The contractor is responsible for mortgage payments, utilities, and maintenance once the home is vacated.
- No travel voucher is submitted for closing costs.
- The sale is guaranteed to the transferee, therefore the transferee is not at risk if the sale does not close. Finding a replacement buyer is the contractor's responsibility.
- There is **no tax liability** for this transaction.
- The contractor will invoice NOAA in accordance with the contracted fee. Once the invoice is paid, the RSC will forward a copy of the invoice to the gaining office.
- The portion of a fee for any residence whose value is over \$300,000.00 is the responsibility of the transferee, unless approved by a waiver. The fee will be deducted from the transferee's equity.

2) **If the transferee does not receive an outside offer before the 90th day (Appraised Sale)**, the contractor will make an offer to purchase the transferee's residence for its fair market value as determined by independent appraisals. Transferees must notify their servicing RSC when their house does not sell within 60 days.

- Appraisals are initiated on day 60 and are made on the property in an "as is" condition. Appraisals shall be conducted according to the Employee Relocation Council (ERC) appraisal form. The appraiser shall use a marketing time of not less than 120 days and not more than 180 days.
- The transferee has up to 60 days to accept the offer by the contractor.
- The transferee should continue to independently market the home during the acceptance period.
- If the transferee receives an outside offer after the 90-day marketing period, he/she reviews the offer with the contractor.
- If the transferee intends to take the outside offer to the contractor, the transferee must not sign anything or accept any money. The contractor will review the offer and will verify that the offer from the outside buyer is bona fide. Based on the findings, the contractor may amend the appraised value offer to reflect the value of the offer from the outside buyer.
- If the transferee rejects the outside offer or does not accept the offer from the contractor, the transferee may request direct real-estate reimbursement under FTR, Chapter 302-6. The transferee will not be reimbursed for any charges (inspection fees, appraisal fees, etc.) that duplicate fees paid to the contractor.
- If the transferee signs a sales contract or accepts any money, the transferee is automatically out of the program. The transferee can only re-enter the home-sale program if the outside offer fails to close within the 60 day appraised offer period.
- If the transferee does not receive an outside offer and accepts the offer made by the contractor, the contractor will purchase the transferee's residence for its fair market value as determined by the independent appraisals. The contractor will invoice NOAA in accordance with the contracted fee. Once the invoice is paid, the RSC will forward a copy of the invoice to the gaining office.

- During the acceptance period, the contractor may advance up to 95 percent of the transferee's estimated equity, based on the appraised value offer, if the transferee requests such advance for the purpose of purchasing a home at the new duty station.

The equity advance may be secured by a second deed of trust or other security which the contractor deems satisfactory. In the event that the transferee does not accept the contractor's appraised value offer, the contractor may use normal legal recourse if the transferee fails to repay amounts advanced. Furthermore, in the event that the transferee does not accept the contractor's appraised value offer, the contractor may charge the transferee a \$125 administrative fee. The Government shall not accept responsibility for repayment of the amount advanced and the contractor shall have no legal recourse against the Government if the transferee fails to pay the amounts advanced.

The equity advance shall be deducted from the transferee's equity upon the contractor's acquisition of the property. The contractor's cost of money or any other administrative charges will not be charged to the transferee or to the Government.

4. **Home Purchase Benefits for the Transferee**

- Receipt of mortgage counseling and mortgage approval, if requested, within 48 hours of contacting the contractor.
- Receipt of reimbursable closing costs from the contractor at closing.
- Elimination of the requirement to submit a travel voucher for closing costs associated with the purchase of their home.
- Potential ability to quickly purchase a home at the new duty station.
- Early access to demographic information on every town, school, and neighborhood in the United States.

Home Purchase Program

The voucherless home purchase process allows the transferee to apply for a mortgage loan through Cendant Mortgage. The transferee will be provided with individual counseling to familiarize him/her with the program.

- Once notified by the RSC, Cendant Mortgage will contact the transferee to explain the home purchase process. Cendant Mortgage will analyze the transferee's financial position to determine which mortgage will meet the transferee's needs.
- Cendant Mortgage will advise the transferee regarding which home purchase costs are reimbursable. A partial list of reimbursable costs can be found in section 9(a), pages 16 and 17 of this pamphlet.
- Cendant Mortgage will complete the loan application by telephone with the transferee.
- Cendant Mortgage will mail the completed loan application to the transferee. The transferee will review and sign the loan application return it in the prepaid return envelope.
- Prior to closing, the transferee will receive information from the Cendant Mortgage outlining reimbursable closing costs according to the FTR. The transferee will bring the remaining funds to closing.
- Once the loan is approved, Cendant Mortgage will pay reimbursable closing costs on behalf of the transferee at settlement.
- Cendant Mortgage will forward an itemized invoice, and a signed copy of the HUD-1 form (settlement statement) to the appropriate RSC for payment. Once the invoice is paid, the RSC will forward a copy of the HUD-1 form and itemized invoice to the gaining office.
- Cendant Mortgage will establish a repayment schedule with the transferee for any non-reimbursable items that were advanced to the transferee but were not reimbursed to Cendant Mortgage by NOAA.
- A travel voucher for closing costs is not submitted.
- **No taxes are withheld but a tax liability is created.** A W-2 will be sent to the transferee for the amount of the reimbursable closing expenses.

Note: NOAA is not responsible to pay Cendant Mortgage for expenses that are not reimbursable according to the FTR.

We hope this general information is helpful. For further assistance and advice, you may contact the person listed on the cover sheet or the person authorizing the travel in your bureau. All questions on NOAA's home sale/home purchase programs should be directed to the person listed on the cover sheet.

APPRAISALS: QUESTIONS & ANSWERS

The appraisal process

The appraised value offer which the relocation company will make to you is determined by averaging two appraised values prepared by independent professional fee appraisers. The following frequently asked questions and the answers will help you understand the relocation appraisal process.

What is an Appraisal?

An appraisal is an estimate (opinion) of value prepared by an independent professional appraiser who is familiar with all the factors that may affect the sale. By definition, appraising is not an exact science. There are several kinds of real estate appraisals, including replacement (reconstruction) value, insurance value and market value. Since different appraisal methods are used to compute each type of appraisal don't be alarmed if you had your house appraised recently for refinancing or insurance purposes and the value varies from your guaranteed offer.

A relocation appraisal is a market value appraisal defined by the Employee Relocation Council as:

the price for which property would most probably sell if exposed to the market for a reasonable period of time in an "as is" condition where payment is made in cash or its equivalent."

This definition assumes that the market value is a price for which a home would sell with title passing at settlement if:

the buyer and seller were well informed and acting in what they consider their best interests;

the home was exposed (listed) in the local real estate market for a reasonable amount of time, usually up to 120 days;

financing is on terms generally available in the area and typical for the type of property (if special financing, such as VA or FHA is appropriate and available, its specific effect should be stated separately);

forecasting, based on an analysis of the recent trends in the comparable real estate market, is used to project the probable value.

In other words, the appraiser will look at your home through the eyes of the average buyer and develop an estimate of the price that a buyer, comparing your home to others that meet his/her general requirements and acting in his/her own best interest would probably pay for your home.

The value is not the highest nor the lowest price a buyer might pay; it is the most likely price within a range of values. There is an equal chance that the property will sell higher or lower than the appraised value.

Who are the appraisers?

The appraisers are local professionals who specialize in appraising residential real estate. In most cases they belong to professional societies that establish educational and professional standards for their certification.

The appraisers are not employees of the relocation company. They are independent contractors, paid a fee for each appraisal performed. Their appraisals reflect their impartial professional judgment.

How does an appraiser establish market value?

The appraiser collects and analyzes information about your home, your neighborhood, comparable homes listed and recently sold, the current real estate market, and economic or other factors that may affect value. These include:

- supply and demand--the number of buyers and the number of homes available;
- mortgage availability--interest rates affect real estate values;
- economic conditions--area economic changes (unemployment, strikes, etc.) affect the number of qualified buyers;
- government action--zoning changes, taxation, school boundaries can affect housing prices;
- environmental factors--convenience, availability of public facilities, proximity to parks or industrial sites impact the value of property;
- location--the condition and attractiveness of your neighborhood and community affects your home's value;
- condition--both structural and decorative condition will be reflected in the "as is" appraised value;

- comparable sales--your home will be compared and adjustments made to similar properties recently sold that a buyer probably would have considered in deciding what to offer for your home.
- comparable listings--homes on the market similar to yours will indicate the trend of the market, up or down.

The appraiser chooses recently sold properties that are most similar to your home and then adjusts the selling prices by comparing the condition and features to yours. Type of financing, improvements, condition, appeal, and time of sale may all suggest adjustments. The adjustments are given a dollar value which is added or subtracted from the selling price.

The three comparable adjusted values establish the range within which your home will probably sell. The appraiser assigns a market value within that range based on the most similar property and the trend of the real estate market as the market value.

What instructions do the relocation companies give to the appraisers?

The relocation companies are required by the terms of their contracts to give identical instructions to each appraiser.

Those instructions are to appraise current market value of the property in "as is" condition based on normal marketing time of up to 120 days. In most real estate markets 90 to 120 days is the average marketing time for homes. Most real estate listing agreements are written for 90 to 120 days.

"As is" condition means the condition of the property at the time the appraiser inspects it. If your home requires repairs or maintenance work to meet local selling standards or normal buyer's expectation, the appraisers are instructed to adjust their values for the estimated cost.

If I get an offer for more than the relocation company offer, doesn't that mean the appraisers were wrong?

Not necessarily. Remember that your guaranteed offer is your "safety net," the amount you are guaranteed if you don't sell your home for more during your 60-day acceptance period. The relocation program is designed to help you get a higher offer so that the relocation company can amend its offer to you. That is why you are encouraged to list your home. The relocation companies will advise you on marketing and negotiating strategies.

It is normal for the final selling price of a home to be about five percent higher or lower than the guaranteed offer. In a rapidly changing real estate market the difference may be more.

My neighbor says he got more for his home than my guaranteed offer. Why didn't the appraisers know that?

What your neighbor tells you and what the "net" sale price of the home was may be two very different things. Remember, there is a big difference between asking price and sale price. Concessions to a buyer, whether it be a decorating allowance, owner financing, or VA or FHA "points," are all costs that must be considered. In addition, there may be condition factors, timing factors, or other considerations that could result in higher selling price for a home that seems similar to yours.

What should I do if I'm sure my home's market value is more than my offer?

Review your appraisals carefully and ask your counselor to explain anything you don't understand.

Each relocation company has an appeal process that you may use to have the appraisers reconsider their values. To use the appeal process ask your counselor to explain in detail the procedures you must follow. You must submit your written appeal of your guaranteed written offer to the contractor and to the relocation services coordinator within thirty (30) calendar days from receipt of the written offer.

Here are a few tips to help you if you decide to appeal your offer.

- Review your copies of the appraisals. Make a list of questions; then call your counselor to seek the answers to your questions. Do send your written appeal in as quickly as possible since written responses from each appraiser are required.
- If you think the appraisers missed some important information, ask your listing realtor to research the comparables used and suggest others that might be more appropriate. Include this information in your written appeal.
- Be patient. Each written appeal must be submitted to each appraiser for their written response. Sometimes one or both of the appraisers will need to return to your property to review additional information.
- One of the best indicators of your home's value in the current market is the offers you have already received from interested buyers on your property.

- If your home is not currently listed, list it at a reasonable price and see if someone will offer you more than the relocation company's offer. Your relocation counselor can help you find a realtor if you aren't familiar with any in your area.
- If your home is listed quite a bit higher than your guaranteed offer, analyze the activity. Have you had a lot of lookers but not buyers? Perhaps a good strategy at this point would be to lower the list price on your home. Have you had one or more offers near your guaranteed offer amount? Remember to use the security of the guaranteed offer to help you negotiate with your outside buyer to achieve an amended offer. Your relocation counselor can help you determine the best negotiating strategy.
- Keep in mind that you have 60 days to continue to market your property while considering the relocation company's offer. Use that time wisely to find a buyer who will pay you more than your guaranteed offer. Use your "safety net" guaranteed offer to your best advantage to negotiate an amended sale.
- Remember, if you cancel from the guaranteed home sale service and later sell your home and voucher your expenses, any duplicate expenses may not be fully reimbursable.

THIRD PARTY ELIGIBILITY QUESTIONNAIRE

Date_____

Employee Name_____

Social Security #_____ Travel Order #_____

Residence Address:_____

Date Reported for Duty_____

1. Is an extension for the sale of the residence required? Yes_____ NO_____
If yes, has an extension been authorized? Yes_____ NO_____
2. Is the title to the residence in the name of the employee? Yes_____ NO_____
3. Are there coowners to the residence? Yes_____ No_____
If yes, are the coowners members of the immediate family? Yes_____ No_____
4. Is the residence a one-family dwelling? Yes_____ No_____
5. Is the residence, or property on which the residence is located, used for commercial purposes? Yes_____ No_____
6. Is the residence on an acreage? Yes_____ No_____
7. Did employee commute to and from work from this address? Yes_____ No_____

8. Is the residence a mobile home, or a co-op? Yes_____ No_____

9. Is the residence currently listed with a real estate broker? Yes_____ No_____

10. Name of Spouse_____

11. Current Listing Price_____

12. Address of Home to be Sold_____

13. Phone numbers: Work_____

Home_____

14. New Duty Station_____

15. Mortgage Counsel? Yes_____ No_____

16. Home Finders? Yes_____ No_____

17. Home Marketing? Yes_____ No_____

18. Sales Assistance? Yes_____ No_____

19. Do you understand what you should do if you are in the program and a real estate agent brings you an offer?

20. Do you understand what happens if you are in the program and withdraw?
