

# DUPLICATE HOUSING REQUEST

(Full-Time Employees Only)

Submit monthly until previous home is sold, or no longer renting

NAME: \_\_\_\_\_ FOR MONTH OF: \_\_\_\_\_

Emp. ID: \_\_\_\_\_

**Current Home:**

Rent/Mortgage (copy of lease/rental statement OR mortgage statement) \_\_\_\_\_

**Rental Expenses (on previous home)**

Rent (copy of lease or rental statement required) \_\_\_\_\_

Utilities (copy of current statement required) \_\_\_\_\_

Yard Care (copy of current statement required) \_\_\_\_\_

**TOTAL** \_\_\_\_\_

**Mortgage Expenses (on previous home)**

Principal and interest (copy of current statement required) \_\_\_\_\_

Property taxes (if not included in monthly payment – (copy of tax bill required) \_\_\_\_\_

Insurance (if not included in monthly payment – copy of insurance bill required) \_\_\_\_\_

**SUBTOTAL** \_\_\_\_\_

Additional Expenses:

Utilities (copy of current statement required) \_\_\_\_\_

Yard Care (copy of current statement required) \_\_\_\_\_

**TOTAL** \_\_\_\_\_

After three months – copy of appraisal and copy of sales listing at no more than 100% of appraised value required.

Date turned in..... \_\_\_\_\_

Appraisal Cost (copy of appraisal and invoice for appraisal required) \_\_\_\_\_

After six months – copy of sales listing at no more than 95% of appraised value required.

\*See Duplicate Housing Policy on second page. (Y 16 06) Duplicate Housing is considered moving expense.

\*Employee must read and return signed Amortization/Authorization page.

**OFFICE USE ONLY**

**Request #** \_\_\_\_\_

Maximum amount eligible for: Code 10511 \$ \_\_\_\_\_

## Working Policy 2020-2021

### AMORTIZATION OF MOVING EXPENSES AND AUTHORIZATION

#### Y 16 06 Additional Housing Assistance—

##### 1. Duplicate Housing—

**a. Initial Assistance**—When an employee is moved from one location to another, and because of the conditions of his/her lease or failure to sell or rent his/her home, he is required to pay housing expenses both at his/her former location and at his/her new location, an allowance may be granted to cover the time when payments are being made at both locations and both homes are habitable. The allowance may be granted under normal conditions up to three months.

**b. Unusual Circumstances**—In unusual circumstances when the employee has not been able to sell the home at his/her former location and evidence is presented indicating that the asking price for said home at the end of the three-month period referred to in 1. was no more than 100 percent of an appraisal provided by an independent appraiser, up to an additional three months' assistance may be granted. An independent appraiser shall be understood to be a qualified appraiser such as may be contacted through banks or home loan associations. Real estate agents shall specifically be excluded from this group. The reasonable cost of such appraisal will be reimbursed by the employing organization.

**c. Extreme Circumstances**—If the employee has not been able to sell the home after having received an allowance for six months because of extreme circumstances, the allowance may be continued for a further period of up to six months if the asking price for the said home is not more than 95 percent of the appraisal during this period.

**d. Amount**—When granted, the monthly allowance shall be the actual expense for principal and interest, property taxes, and insurance up to 100 percent of the cost factor (housing/utilities/ property tax of the Relocation Analysis Report) as indicated by ERI/Statistics Canada for which the employee was eligible at the former location. Fifty percent of any rental income shall be deducted from the allowance.

**2. Sharing of Loss on Sale**—In view of the importance of pricing a home correctly before it is placed on the market, and due to the critical importance of the first 30 days in the sale of the property, both the employee and the new employer may agree at any time during the selling process that in lieu of spending all the duplicate housing allowance provided in Y 16 06, items 1 through 4, the property may be placed for sale at less than one hundred percent of market value as determined by current appraisal. The cost of the reduction may be shared between the new employer and the employee at an agreed upon ratio on an individual basis. The employer cost is not to exceed the maximum duplicate housing allowance provision.

**3. Purchase of Employee's Home**—If in the course of transitioning an employee from one location to another, the employing organization decides that it is in its best interest to acquire the home where the employee currently lives, in order to facilitate the relocation of the individual to the new job assignment, the employing organization may exercise that option with the approval of the governing committee and where applicable, the association or corporation. The home shall be appraised by a third party, and the price will be set excluding realtor fees.

**4. Coordination of Benefits**—The employing organization should discuss the options available to the employee and should avoid the unnecessary multiple application of the provisions of this policy.

## Amortization of Moving Expenses

The following provisions govern the amortization of moving expenses in negotiations regarding employee moves:

- a. Any organization in the North American Division calling an employee who has rendered less than 2 years of service to an employing organization shall make 100% reimbursement for the employee's last move to that location.

Service of fewer than 2 full years .. 100% reimbursement due the employing organization  
Service of 2 to 3 years..... 50% reimbursement due the employing organization  
Service of 3 to 4 years..... 25% reimbursement due the employing organization

- b. Any unamortized moving expenses, as calculated in, the above "a", shall be reimbursed to the last denominational employing organization by an employee who leaves denominational employment prior to a minimum service term of 4 years at the last place of employment, providing the employee initiates the termination. If the employing organization initiates the termination, it shall assume the unamortized portion of moving expenses.

I request duplicate housing assistance and I fully understand the Duplicate Housing Policy and Amortization of Moving Expenses.

\_\_\_\_\_  
Signature of employee

\_\_\_\_\_  
Date