

MOVING EXPENSES / POLICY & PROCEDURES

MOVING FUND POLICY, PROCEDURE, REIMBURSEMENT FORM - 2019

Information related to the move to your new appointment or into your retirement years. **Please read through the packet carefully.**

Important Dates for Annual Conference Moves:

Effective Date for all new Annual Conference moves is July 1.

Last Sunday - current church: Last Sunday in June.

MOVE DAY: Wednesday between the last Sunday in June and first Sunday in July.

First Sunday - new church: First Sunday in July.

ELIGIBILITY

Eligible:

- ✚ Elders in Full Connection*
- ✚ Associate Members*
- ✚ Full-Time Local Pastors*
- ✚ Provisional Members*
- ✚ Commissioned Ministers preparing for ordination as Elders in Full Connection, Associate Members or Full-Time Local Pastors*
- ✚ Retiring clergy in one of the first three relationships above are eligible to receive funds for one move into housing not already owned or supported by a local church after retirement, up to the maximum allowed. In circumstances in which the retiring pastor, in one of the first three relationships listed above, planning to retire moves prior to the retirement date, reimbursement for a move made within one year prior to the retirement date shall be made upon retirement, contingent upon the presentation of proper documentation.
- ✚ Voluntary Transition Program sponsored by Wespath.
- ✚ Medical or Disability Leave.
- ✚ The family of a clergy person in the first five relationships above who dies while under appointment shall be eligible to receive funds for the initial move into housing not already owned or supported by a local church, up to the maximum amount allowed.

*Appointed to a local church in the Central Texas Annual Conference or for whom the Conference is pension responsible (such as District Superintendents, Conference Directors, Wesley Foundation Directors.)

Ineligible:

- ✚ Deacons
- ✚ Part-Time Local Pastors
- ✚ Leave of Absence, of any kind. (Does not include Medical/Disability Leave.)
- ✚ Surrender of Credentials, either voluntarily or involuntarily.
- ✚ Moves that do not involve change of appointment.
- ✚ Those eligible clergy who change appointments, but who do not change houses, will not be eligible for any moving funds, with the exception of a maximum of \$500 for moving office supplies upon the presentation of proper documentation.

Moving Allowance

Our Conference Moving Policy has two options: (a) Self-Move and (b) Commercial Move. The total expense of either choice will not exceed \$2,900 to the Conference. All documentation must be submitted to the Conference Treasurer within **sixty (60) days** of the effective date of the appointment.

✚ **Self-Move** – The Self-Move plan will normally consist of the pastor paying the initial bill and being reimbursed the actual expenses up to a maximum of \$2,900. Proper documentation of receipts for the cost of van rental, gasoline, boxes, tape and packaging material and \$2.00 per mile must be submitted to the Conference Treasurer before receiving reimbursement.

✚ **Commercial Move** – Whether you interview and hire your own commercial moving company, pay the bill and turn in receipts for reimbursement or use one of the commercial movers from the list we supply that will bill the Conference, makes no difference. Upon receiving the invoice from the moving company or receiving the receipts from you, the Conference will pay for the commercial move up to a maximum of \$2,900 of actual moving expense. The Commercial Move includes the cost of the movers and cost for boxes, tape and packaging material not to exceed the total of \$2,900.

In either case any expense above the maximum of \$2,900 will be the responsibility of the pastor.

In no case will the Conference pay more than the actual expenses incurred, up to a maximum of \$2,900 for a move.

Moving Reimbursement Taxable Income

The Tax Cuts and Jobs Act suspended the application of US Tax Code Sections 217 and 132(g) from January 1, 2018 through December 31, 2025. The end result of this suspension is that (1) moving expenses incurred during that time period will not be a deductible expense (except for certain members of the Armed Forces) and (2) any reimbursement by, or payment of, these expenses by an employer during the same time period will need to be reported as taxable income to the employee.

All [near and far, large and small] moving expenses reimbursed to clergy, or paid on behalf of clergy, will now be taxable income and the amount reported as wages on the W-2 or 1099 forms.

Method of Payment

A list of movers that will bill the Annual Conference is found below. All expenses that are within the Annual Conference Allowance will be billed directly to the Annual Conference by those moving companies. If a moving company is used that will not bill the Annual Conference directly or the clergy chooses a self-move, then the moving clergy/family is responsible for the bill and will be reimbursed by the Annual Conference for all documented expenses that are within the Annual Conference Allowance. Any documented expenses paid by the moving clergy/family are to be submitted to the Annual Conference Treasurer with a completed moving expense form within sixty (60) days of the appointment. The Conference Treasurer shall issue payment to the moving company or the entity that incurred the expense.

**Central Texas Conference Clergy Moving Companies
2019 Contracts**

Company	% off Texas Moving Tariff	Rates for Contiguous County Moves	Other
All Points Pioneer 817-275-6888 - Phone 817-275-7847 - Fax Erin Metcalf erin@allpointsoftexas.com 2450 114 th St., Ste. 290 Grand Prairie, TX 75050	71% (+ appl. fuel surcharge)	3 men/1 van \$108 per hour 4 men/1 van \$135 per hour 5 men/1 van \$165 per hour 12,000 lbs. \$150/hr. \$1,350.00 16,000 lbs. \$175/hr. \$1,620.00	Free Used Boxes delivered plus paper and tape at no charge (for local moves).
Berger/Allied Van Lines 817-799-3014 1-800-678-3980 Mark McIntire UMC Account Manager markm@bergerallied.com	70% (+ appl. fuel surcharge - currently 7% but changes every month)	2 men/1 van \$90 per hour 3 men/1 van \$120 per hour 4 men/1 van \$150 per hour 5 men/1 van \$180 per hour	Free Used Boxes delivered plus paper and tape at no charge.

Bekins A-1 Movers, Inc. 817-308-9999 Fort Worth Area – Sharon Cantrell scantrell@bekinsms.com 817-456-2339	At least 65%	2 men/1 van \$99 per hour 3 men/1 van \$130 per hour 4 men/1 van \$161 per hour 5 men/1 van \$192 per hour	Free Used Boxes delivered plus paper and tape. *\$50 delivery charge* Each additional man and/or truck is \$32.00.
Buehler- May Flower Trans & Stg. Ryan Wasikowski rwasikowski@buehlercompanies.com Lisa Purvis lpurvis@buehlercompanies.com 633 Mony St. Ft. Worth, TX 76102 817-624-8466/ 972-330-7217	62 % (+ appl. fuel surcharge)	2 men/1 van \$90 per hour 3 men/1 van \$120 per hour 4 men/1 van \$150 per hour 5 men/1van \$180 per hour	Free Used Boxes delivered plus paper and tape at no charge. Insurance is included as per the state tariff at 0.60c per pound per article.

Exceptions

- a) Exceptions to any of the above may be approved or denied by the Central Texas Conference Treasurer in consultation with the previous and receiving District Superintendents.
- b) Appeals of any decision by the Conference Treasurer may be directed to the Commission on Equitable Compensation and Clergy Benefits. The Commission on Equitable Compensation and Clergy Benefits shall have final authority to interpret the moving policy and make decisions.

Moving Procedures

1. **Receiving DS** gives to the clergy the Moving Packet which includes moving companies that will bill the Annual Conference, and other pertinent moving information.
2. **The Pastor/Staff Parish Relations Committee of each charge which is receiving a new pastor** will appoint one of its members to serve as Moving Coordinator who will coordinate the move with the incoming pastor and work to facilitate the easiest and most pleasant move possible. At the introductory meeting between the Pastor/Staff Parish Relations Committee and the new pastor, the Moving Coordinator will be present so to be introduced to the pastor.
3. **The Clergy...if using a commercial mover**, should get estimates from at least two moving companies of his/her choice and chooses the one he/she wishes to use. The clergy contracts with the company of choice to move them and sends the bill to the Annual Conference Treasurer. If the moving company will direct bill the Conference, and the estimate is over \$2,900, the clergy will send a check to the Conference Treasurer for the amount over the \$2,900 limit with a copy of the final moving company invoice and the completed reimbursement form. If the company is one that will not send a bill to the Conference for payment, he/she can work out payment with the Annual Conference by having the mover call the Conference Treasurer or Staff Accountant at 817-877-5222 or pay the moving company and submit the completed reimbursement form and documentation of expenses for reimbursement.
4. **The Clergy...if choosing a self-move**, keeps all their receipts for the cost of van rental, gasoline, boxes, tape, packaging material and \$2.00 per mile and turns in the completed reimbursement form and required documentation to the office of the Central Texas Annual Conference Treasurer within **sixty (60) days** of the effective date of the appointment for reimbursement.
5. **Commercial Moves Billed Directly to the Conference Office:** The Moving Notification and Expense Reimbursement Form must be completed and returned to the Conference Treasurer **before** the moving company invoices the Conference Office.
6. **Non-reimbursable moving expenses** include the following: meals, lodging, round-trip or multiple-trip mileage, temporary storage, furniture/fixture repair/replacement, or any moving equipment such as dollies, ramps, trailer hitches, chains, ropes, tie-downs, locks, tape dispensers, or any other moving hardware that has lasting tangible value.

MOVING NOTIFICATION AND EXPENSE REIMBURSEMENT FORM

Rev. 3/2019

Central Texas Conference
3200 E Rosedale St., Fort Worth, TX 76105-2334
(817) 877-5222 817-338-4541 fax
finance@ctcumc.org

Instructions:

- ◆ The Conference will pay up to a maximum of \$2,900 of actual allowable moving expense.
- ◆ Complete Option **1, 2, or 3** and return within **sixty (60) days** of effective date of appointment.
- ◆ Keep a copy of the form and receipts for your records.
- ◆ Provide a summarized list of expenses and proper documentation of all moving expenses (moving co. invoices, truck/trailer rental agreements, rental truck gas receipts, boxes, tape, packing paper, etc.)
- ◆ **NON-REIMBURSABLE** expenses are meals, lodging, round-trip or multiple-trip mileage, temporary storage, furniture/fixture repair/replacement, or any moving equipment such as dollies, ramps, trailer hitches, rope, tie-downs, locks, tape dispensers, or any other moving hardware that has lasting tangible value.
- ◆ Mail this form, all receipts, and summarized list of expenses to the **Conference Treasurer**.
- ◆ **Direct payments or reimbursements of moving expenses by CTC or local church are taxable income to recipient.**

(Please Print)

Name _____ Date of Move _____

Address _____

City _____ State _____ Zip _____

Telephone (cell) _____ (home) _____ (work) _____

Email Address: _____

Moving From (Charge/City) _____

Moving To (Charge/City) _____

Distance between old Residence and new Charge (lead-church): _____

OPTION 1. SELF MOVE:

- A. All Reimbursable expenses (total from summarized list – see Instructions)... \$ _____
- B. Add: Miles one-way between charges _____ X \$2.00/ mile \$ _____
- C. Total Cost of Self Move (A. + B.) \$ _____

OPTION 2. COMMERCIAL MOVE BILLED DIRECTLY TO CONFERENCE:

The Conference recommends getting two or three estimates if total is near or over \$2,900.

Moving Company Name: _____

- A. Moving Company Invoice/Statement Amount billed directly to Conference \$ _____
- B. Amount from Line A over \$2,900 reimbursement limit (Line A – \$2,900.00).....\$ _____
- C. **Include a check payable to CTC for the amount on Line B when submitting this form.**
- D. Other expense for supplies (boxes, tape, etc. – see instructions \$ _____

OPTION 3. COMMERCIAL MOVE PAID BY CLERGY:

- A. Amount paid by Clergy directly to Commercial Moving Company \$ _____
- B. Other expenses for supplies (boxes, tape, etc. - see Instructions \$ _____
- C. Total of Lines A + B \$ _____

Submitted by _____ Date _____

Clergy Signature

Date