

## Household Goods Moving Services – PROCESS and EXCLUSIVE PROVIDER CONTACTS

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EXCLUSIVE PROVIDERS are **mandatory sources** for Household Goods Moving Services for all SMU campuses in compliance with SMU Policy 4.8. **Household Goods Moving Services** pertains to moving personal property, vehicles, and lab equipment.

SMU Exclusive Movers are **LOCAL AGENTS** for National Carriers and are independent companies that coordinate moves with the Origin Agent. Origin Agents will conduct an in-home inventory survey (either physical or virtual) to determine approximate weight of items that will be moved and provide an estimate.

Effective 1-1-2018, the Tax Cuts and Jobs Act requires that **all relocation expenses be treated as taxable compensation to the employee regardless of whether payment is made to a third-party vendor on behalf of the employee or whether reimbursement is made directly to the employee. Accordingly, SMU reports all moving expenses as taxable compensation to the employee through payroll with appropriate withholding taxes following the payment of the moving company's invoice.**

The **Moving Expense Verification and Reimbursement Form** is required for on all relocation moves, and used for tax reporting purposes and reimbursement of **out-of-pocket moving expenses** such as airfare and hotel charges. Obtain the Moving Expense Verification and Reimbursement Form using this [link](#) to the Tax Compliance Office webpage.

### **PEAK MOVING SEASON is MAY through SEPTEMBER**

Move schedules are very tight during peak moving season and fill up fast. Moving companies recommend:

- Request estimates at least 6 weeks in advance of the expected move date.
- **Reserve the move at least 30 days in advance of anticipated move date.**

## 1 ----- EXCLUSIVE MOVER PROCESS - SMU LOCAL AGENTS -----

| <b><u>SMU LOCAL AGENTS</u></b>     | <b><u>RESPECTIVE NATIONAL CARRIER</u></b> |
|------------------------------------|---|
| A1 Freeman Moving Group            | North American                            |
| Armstrong Relocation               | United Van Lines                          |
| Berger Transfer & Storage          | Allied Van Lines                          |
| Daryl Flood Relocation & Logistics | Mayflower                                 |

SMU utilizes contracts through E&I Cooperative Services for moving and relocation services.

**CONTRACT BENEFITS:** 1) Through the E&I contract, SMU receives pricing discounts and Full Value Liability Protection with zero deductible for household goods shipments, released at \$6.00 per pound minimum, up to \$120,000 at no additional charge. Additional coverage can be purchased from the moving company.  
2) Purchasing can intervene with the mover on employee's behalf.

### **Employee Responsibility**

1. Contact SMU LOCAL AGENTS for household goods, vehicle and lab equipment moves.  
\*\*\*DO NOT contact the National Carrier or another agent of the National Carrier\*\*\*
2. Obtain estimates from one to four of the SMU LOCAL AGENTS based on department requirements. Getting at least two estimates is recommended for price comparison.
3. Email estimates to the department contact and state which moving company is preferred.
4. **Estimates are non-binding estimates and not considered a bid, contract or guaranteed price.**
5. **Final moving charges are figured on ACTUAL weight of items moved, mileage and services performed.**
6. Communicate, schedule/book move, and report damage or loss **directly with the SMU Local Agent.**
7. After completion of move, sign and submit the Moving Expense Verification and Reimbursement Form to the department contact. Reimbursement approval is in accordance with the move allowance agreement.

2 ----- **EXCLUSIVE MOVERS – LOCAL AGENT CONTACT INFORMATION** -----

**A-1 Freeman Moving Group - North American Agent \*\*\* SMU Supplier ID # 21097**

2242 Manana Drive, Dallas, Texas 75220

[www.a-1freeman.com](http://www.a-1freeman.com)

**Primary Contact: Mireya Ducot**

Email: [eandi@a-1freeman.com](mailto:eandi@a-1freeman.com)

972-506-1729 – E&I direct line

Alternate Contact: Jonathan Hightower

972-556-1777 – direct

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**Armstrong Relocation - United Van Lines Agent \*\*\* SMU Supplier ID # 37**

1405 Crescent Drive, Carrollton, Texas 75006

<http://dallas.armstrongrelocation.com>

**Primary Contact: Ken Williams**

972-389-5679 – direct

800-283-0511 – toll free

[kwilliams@GoArmstrong.com](mailto:kwilliams@GoArmstrong.com)

Alternate Contact: Michael Gonzales

972-389-5650 – direct

[MGonzales@GoArmstrong.com](mailto:MGonzales@GoArmstrong.com)

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**Berger Transfer & Storage - Allied Van Lines Agent \*\*\* SMU Supplier ID # 722**

14850 Grand River Road Fort Worth, Texas 75220

<https://www.bergerallied.com/>

**Primary Contact: Mark McIntyre**

[MarkM@bergerallied.com](mailto:MarkM@bergerallied.com)

214-802-5207 – cell

800-678-3980 – toll free

**Move Coordinator: Rosalyn Washington**

[rosalynw@bergerallied.com](mailto:rosalynw@bergerallied.com)

817-799-3013 – direct

800-678-3980 ext. 31-3013

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**Daryl Flood Relocation - Mayflower Agent \*\*\* SMU Supplier ID 106922**

450 Airline Drive

Coppell, TX 75019

[www.DarylFlood.com](http://www.DarylFlood.com)

**Primary Contact: Jaclyn Toney**

Relocation Consultant, Suddath Connect

940-331-6041 – direct

[Jaclyn.Toney@suddath.com](mailto:Jaclyn.Toney@suddath.com)

Alternate Contact:

Tom Stallard

(951) 427-2510

[Tom.stallard@suddath.com](mailto:Tom.stallard@suddath.com)

Kirk Parrish

972-745-9582 – direct

[kparrish@darylflood.com](mailto:kparrish@darylflood.com)

Corp. Office Address:

815 South Main St.

Jacksonville, FL 32207

Remit to address:

P O BOX 933225

ATLANTA, GA 31193-3225

### 3 ----- **NON-EXCLUSIVE MOVER REQUIREMENTS & PROCESS** -----

SMU does not have contract agreements with non-exclusive movers. Employee must negotiate pricing and liability coverage with the non-exclusive moving company. **Non-exclusive moving contracts/agreements are between the employee and moving company. SMU Purchasing cannot intervene on employee's behalf.**

The University reimburses for moving expenses up to the agreed upon moving allowance. Submit Reimbursement Requests with an invoice from the moving company. Alternatively, you may choose to receive the moving allowance as a lump sum amount in your first paycheck. **SMU reports all relocation expenses as taxable income whether SMU pays on behalf of the employee or reimburses the employee. The paid expenses are subject to appropriate withholding taxes.**

#### **Employee Responsibility**

1. **Moves contracted with non-exclusive moving companies must be paid with personal funds. A SMU CREDIT CARD CANNOT BE USED.**
2. Communicate, schedule/book move, and report damage or loss directly with the selected mover.
3. After completion of move, sign and submit the Moving Expense Verification and Reimbursement Form to the department contact. Reimbursement approval is in accordance with the move allowance agreement.

### 4 ----- **DEPARTMENT RESPONSIBILITIES for Exclusive and Non-Exclusive Movers** -----

1. Provide employee relocation Instruction Packet documents with LOCAL AGENT contact information.
2. Determine and communicate the moving allowance for employee's relocation.
3. When using **EXCLUSIVE MOVERS**
  - a) Enter an eProcurement Requisition to the SMU LOCAL AGENT selected whether SMU is paying for ALL or a PORTION of relocation expenses. Purchasing will send the Purchase Order (PO) to the moving company.
  - b) **PURCHASE ORDER REQUIREMENTS:**
    - When SMU pays ENTIRE AMOUNT, PO total will be the full estimate amount.
    - When SMU pays a SPECIFIED AMOUNT (moving allowance) toward the household goods moving expense, PO total will be the moving allowance. The moving company will bill SMU for the PO amount (moving allowance) and bill the employee separately for the remaining actual expense.

**\*\*\*NOTE: The moving allowance paid by SMU is taxable income to the employee.**

#### **4. A SMU credit card CANNOT BE USED to pay for the household goods moving company expenses.**

5. Notify employee how payment will be handled.
6. Submit **ONLY ONE completed and signed** Moving Expense Verification and Reimbursement Form for the entire move including all related costs subject to the overall move allowance whether expenses are paid directly to a moving company or paid directly to the employee.
7. Attach original receipts for all expenses. Attach **completed and signed** form to both
  - a) The SMU exclusive mover invoice for payments made by Accounts Payable, and
  - b) The payroll Extra Comp e-form in Manager Self Service of my.smu for any applicable amounts due the employee.
8. Out-of-pocket moving expense reimbursements are reimbursed via EXTRA COMP as taxable income through payroll. Reimbursement is no longer made through Payment Requests or Accounts Payable. *Contact SMU Tax Compliance if additional information is needed.*

### 5 ----- **EXCLUSIVE MOVER SERVICES** -----

#### **Standard Services include:**

Household moving  
International moving  
Top-rated drivers  
Packing, custom crating and unpacking  
Valuation Coverage/Insurance  
Vehicle transportation

#### **Additional Services may include:**

Lab relocation, frozen specimens & sensitive equipment  
Data center & technical equipment moving  
Office, library, and collection moves  
On-site storage solutions at destination facility