WHRGlobal
EMPLOYEE RELOCATION
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We Relocate Families, Not Files

Year-End Preparation Playbook for Clients

For Global Mobility & HR Managers

Introduction

Preparing for year-end is critical to ensure accurate, timely reporting of taxable relocation benefits and to minimize the risk of errors or corrections. This playbook guides clients through each step of the process, helping you coordinate with your payroll and tax providers, communicate with employees, and meet all compliance requirements.

Step-by-Step Year-End Preparation

1. Kick Off Year-End Planning (Mid-October)
    - Action: Begin discussions with your payroll and tax providers.
    - Checklist:
        - ☐ Review any changes in reporting requirements.
        - ☐ Confirm year-end cutoffs for payroll reporting.
        - ☐ Identify any special circumstances that may require W-2C corrections.

2. Coordinate Data & Reporting Cycles (January–October)
    - Action: Maintain regular reporting cycles (monthly, quarterly, etc.) as determined by your organization.
    - Checklist:
        - ☐ Ensure all expense data is up to date in your WHR client portal.
        - ☐ Monitor for any discrepancies or issues throughout the year.

3. Submit Final Payroll Files & True-Up (November)
    - Action: Work with your payroll team to submit final files and complete any necessary true-ups.
    - Checklist:
        - ☐ Double check all relocation-related compensation entries.
        - ☐ Address any last-minute changes or corrections.

4. Finalize Year-End Data (December)
    - Action: Confirm that all year-end data is accurate and complete.
    - Checklist:
        - ☐ Review final reports for accuracy.
        - ☐ Coordinate with external tax providers if applicable.

5. Distribute Employee Reports (By January 31)
    - Action: Email relocation tax reports to employees, including FAQs and explanations.
    - Checklist:
        - ☐ Ensure employees understand their reports and have access to support for questions.
        - ☐ Provide clear instructions for any required employee actions.

Best Practices for Clients

- Proactive Communication: Start early and keep all stakeholders informed.
- Customization: Request tailored year-end reports to fit your organization's needs, these can often be provided at no additional cost.
- Transparency: Share FAQs and explanations with employees to minimize confusion.
- Client-Driven Process: Set reporting cutoffs and cycles based on your organization's requirements and whether gross-up calculations are needed.

Sample Timeline

Month	Client Action
Mid-October	Begin year-end planning and confirm requirements with payroll/tax providers.
November	Submit final payroll files and complete true-up.
December	Finalize all year-end data.
January 31	Distribute relocation tax reports to employees.
Jan–Oct	Maintain regular reporting cycles.

Why Preparation Matters

A well-prepared year-end process ensures compliance, reduces errors, and supports both your organization and relocating employees. By following these steps, you'll deliver a smooth, transparent year-end experience.

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