INCENTIVE - INITIAL RELOCATION MEETING SUBMISSION

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **NAME:** |       | **CODE:** |       | **PARCEL:** |       | **REVIEWER:** |       |
|  |  |  |  |  |
| Attached | Previously Submitted | Submit when available | Form # | Required Items |
|  |
| [ ]  | [ ]  | [ ]  | W-9 | Fully completed and **signed** by the displacee **+ 1 copy** |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #10 | Fully completed and **signed** by the displacee and agent |
|  |  |  |  |  |
| [ ]  | [ ]  | NA | #12 or #25 | Top & Middle portions completed – **signed** by agent  |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #16, 17, or 17A | All items required for a **Residential** 90 Day Notice found on 90-Day Pre-Approval assembly page |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #30 or 30A | 90 Day Notice for **Business** or **PPMO** - **signed** by agent and displacee |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #38 | Self certifying form that must be **signed** by the displacee |
|  |  |  |  |  |
| [ ]  | [ ]  | [ ]  | #9 | Fully completed with landlord’s signature (**renters and landlords only**) |
|  |  |  |  |  |
| [ ]  | [ ]  | [ ]  | #41 A/B/C/D | Appropriate Interview Questionnaire fully completed |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #42B | Payment Notice **signed** by the displacee |
|  |  |  | **\*** | MUST INCLUDE “**Relocation Incentive Payment is considered as reportable taxable income.”** |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #43B | **Tax Law Letter** initialed by the displacee |
|  |  |  | **\*** | MUST INCLUDE “**Relocation Incentive Payment is considered as reportable taxable income.”** |
|  |  |  |  |  |
| [ ]  | [ ]  | [ ]  | #44 | **Title VI Survey** fully completed or initialed by displacee |
|  |  |  |  |  |
| [ ]  | NA |  | #45, 46, 47, 48 | Reestablishment vs. PIL, Reestablishment Guidelines, and Business Eligible and Ineligible Moving Expenses (**businesses only**) |
|  |  |  |  |  |
| [ ]  | [ ]  | [ ]  | INV | Large or unique items should be noted in the caption. |
|  |  |  | **\*** | Photos must clearly identify the personal property being inventoried |
|  |  |  |  |  |
| [ ]  | NA | [ ]  | #49 | Relocation Incentive Agreement fully completed |
| . |  |  |  |  |
| [ ]  | NA | NA | #8 | Agent’s Report detailing the general relocation items discussed |
|  |  |  | **\*** | R8 does not need to be lengthy, but it must be specific and complete  |
|  |  |  | **\*** | R8 should be **signed** by both the agent and displacee |
|  |  |  | **🡺** | MUST INCLUDE “**Relocation Incentive Payment is considered as reportable taxable income.”** |

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| **COMPLIANCE CERTIFICATION** |
| --- |
| *I,* AGENT NAME & TITLE, AGENT COMPANY*, certify that this submittal is made in good faith; that the supporting data is accurate and complete to the best of my knowledge and that this submittal is in accordance with 49 CFR Part 24, PL 91-646 and IC 32-24 and that all applicable rules and regulations of the Federal Highway Administration have been complied with.* |
|  |  |
|  | (Signature) |
|  | Phone: AGENT PHONEEmail: AGENT EMAIL |

Reviewer Comments: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_