

Proposal to provide

Spectrum Technologies

with Professional Relocation Services

(including Property Management)

From

ABC Relocation Inc.

An ISO Registered Company

Corporate Offices:

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May 13, 2021

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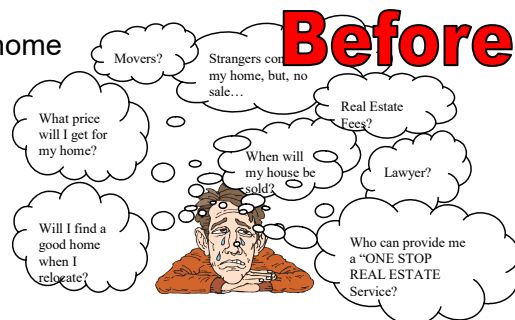
Document Information

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Introduction

Relocation - due to job transfer, promotion - or for any other reason, is a combination of several “mini” projects. This involves selling of current home, travel arrangements for self and family, packing and shipment of personal and household effects, “meet and assist” at the point of arrival, purchase of home in the new location, school admissions, registration with doctor and other formalities, job for the spouse, etc. etc. When the time comes to relocate, **selling a home** is one of the most important and expensive decisions for most people. Several factors including timing, finance, lawyers, movers, emotional, etc. are involved.

Very often people find it **stressful** to enter into the home selling process, because of the many unknowns. However, when you deal with a licensed and dedicated relocation company who takes the time to ask you questions and listens to your individual situation, e.g. ability to sell and buy quickly, at the right price, etc. you will find that the home selling (and buying) process can be stress-free.



Further, if you and your employees had the opportunity to avail of a “**One Stop Relocation Service Centre**”, where the following services could be looked after by ABC Relocation Inc., with a “**single point of contact**”, wouldn't you like to deal with that organization?



In brief, the programs we offer are as follows:

[Guarantee Home Sale Program](#)

After direction from the corporation we contact the employee and review the relocation program with them. Appraisals are ordered from members of the Appraisal Institute of Canada. The relocation counsellor will direct the appraisers in completing a **market approach** to a Relocation Appraisal. At the same time the listing agent will complete a **Market Assessment Summary** on the home. Our Relocation Counsellor prepares a written review with copies for the client and recommends the guarantee and list price. The Counsellor will develop a strong marketing strategy to assist the employee achieve a quick sale for the best possible price. Upon request of the corporation, we would issue equity advances to the employee for purchasing a new home at destination. If the home does not sell ABC will take-over the home, manage the vacant property and continue to aggressively market the home until it is successfully sold.



[Home Sale Assistance Program](#)

Under this program, each employee must speak to us before listing their home. We will assist them with the sale of their home by working with either their preferred listing agent or one that we can recommend based on previous listing experiences. The agent must complete a **Market Assessment Survey** which we analyze to come up with a strong marketing strategy for each home. We ensure that the

designated agent is utilizing every possible tool and approach to get the house sold as quickly as possible and at the highest possible price. Our involvement is initiated with the listing process and continues through to the final sale date.

Home Purchase Assistance Program

This program is designed to assist the employee and their family when moving into a centre with which they may not be familiar. Before an agent is contacted, we initiate our involvement with a **Needs Assessment Survey** which helps to determine the housing and lifestyle requirements of the family. Based on this information, we are in a position to recommend knowledgeable and qualified real estate personnel who work with the family until acceptable housing is identified. Here again, our Counsellors maintain ongoing contact with the family through to closing of the new house purchase.



Mortgage Assistance Program



ABC is able to refer the employee to one of Canada's top mortgage lending institutions for any new mortgages. Our program enables the corporation to save money on the application for the new mortgage and it allows the employee to make significant money savings on the interest rate on long term mortgages. The mortgage program is available throughout Canada through a single 1-800 number accessible 7 days a week.

Legal Program

ABC does a large volume of real estate transactions across the country and has negotiated legal fees that typically represent savings below what law firms would charge an individual homeowner. The legal firms have been selected for their high level of service and their knowledge of the intricacies of corporate relocation.

Rental Assistance Program

This program was designed to assist the employee and family to orient them to their new location. The Counsellor will complete a **Needs Analysis Summary** which will help determine the housing and lifestyle needs of the employee and family. In some centres we will recommend agents who will assist with the rental search however, some areas are serviced only by rental agents on a fee for service basis.

Experience in the Real Estate Market

At ABC, we understand that there is more to moving than simply transferring your family's belongings from one house to another. The disruption reaches to the heart of their lifestyle, and affects the security of the family.

The real estate market can be complicated. Few people buy and sell houses frequently enough to become an expert with the "ins and outs" of real estate. This makes the process of buying and selling a little frightening.

At ABC, our Counsellors work with families that are relocating every day. We will help your employees and their families examine the entire relocation process in order to develop the correct approach for their individual circumstances.

ABC started working with Corporations who did not wish to become landlords. Our main goal has always been on developing a strong marketing strategy on the sale of the home and ensuring the employee was well informed to make good judgement decisions when they purchased.

Our Counsellors are available to all of your employees throughout North America through our 1-800 number. We are ready to help them sell their home and/or purchase a new one in an objective and professional way.

Let us put our knowledge and experience to work for you.

Our programs are designed as a 'menu' of options which corporations can undertake in their entirety or, which can be customized. We will assign a Professional Relocation Counsellor who will be the single point of contact for all the relocation services requested by the company.

Executive Summary

Our Mission Statement and Goal

ABC Mission: Meeting the needs of our clients and the employees they relocate by providing client focused, proactive, cost-effective and innovative relocation management solutions. Our goal is 'The perfect relocation'.

Our objective is to provide either a complete package of relocation services or specific components chosen by Spectrum Technologies that would be in conjunction with other relocation services arranged by your organization.

How does our service benefit Error! Reference source not found. and your employees?

The advantages of using ABC Relocation Inc. services are as follows:

1. Our relocation staff and moving service providers have over 100 years of cumulative relocation experience.
2. **Our counselors are bilingual and can assist your employees with their concerns.**
3. There is an atmosphere of accountability as we have licensed professionals working throughout the relocation process.
4. You receive savings in relocation costs which benefits your bottom line.
5. Your employees receive unparalleled customer service since they are dealing with a **“single point of contact”**, rather than having to call several service providers to implement their move.
6. Apart from the extensive list of services we provide, the main ones that enable your employees to have peace of mind and for you to receive cost benefits are Move Management – Moving of Household Goods, Lease Cancellation, Expense Management, Flexible Lump Sum, Group Moves and **Property Management**. We will briefly explain below the implications and benefits of Expense Management and Property Management:

Expense Management: Expense Management removes the burden of administration from Client. ABC handles this administratively intensive process which requires tight controls and timely reimbursement to ensure the relocating employee's financial needs are met. Each client's expense policy is entered into the policy and procedures portion of our system so that the Relocation Team can review relocating employee expense claims on-line. Expense claims are entered by the administrator into the system for payment and reviewed and approved by the team's Consultant before the payment is released. Following Client's current entitlements, i.e., house-hunting, final move expenses, etc., on submission of an expense account with supporting documentation, we will reimburse the relocating employee for eligible relocation expenses incurred. A central point of contact Consultant works with the relocating employee providing guidance, explanations and recommendations throughout the transfer.

Property Management: Our Property Management Program is a bilingual service covering all properties across Canada regardless of location. One of our advantages is that we cover all urban and rural sectors on a national scale. Our programs are designed to meet the requirements and standards set out by insurance companies on vacant and rental properties and to ensure the property safety and security.

7. You develop loyalty and long-term employment relationship with your employees who appreciate that you utilized the services of a renowned relocation company to look after their move. When you use our services, your employees enjoy peace of mind throughout the relocation process, which is a time of stress and a lot of uncertainties.

Property Management Services

Our Property Management Program is a bilingual service covering all properties across Canada regardless of location. Our programs are designed to meet the requirements and standards set out by insurance companies on vacant and rental properties and to ensure the property safety and security.



The comprehensive services will meet all your property management requirements such as rentals, rent collection, payment of nonresident taxation, vacant property management, snow removal, grass cutting, landscaping, inspections, housecleaning and other maintenance requirements. Whether the property is a detached single-family dwelling or a condominium in a high-rise building, our Property Management Services will care for them all. Our specialty is to provide full-service programs that will ensure your transferring

employees can leave their homes in our care throughout the term of their assignment and return worry free.

We will design the appropriate program to suit your requirements. No matter how large or small or how many sites are involved, we are able to manage your portfolio and provide the highest level of customer service available.

Rental Management

When your employees are transferred on a long-term assignment and retain their home at origin, ABC can arrange to maintain the property on behalf of the employee. Whether the employee has found a tenant or wants us to look after the entire process we can handle the job.

Establishing the Value

In order to establish the rental value of the property we order appraisal(s) on the home. We direct the appraiser(s) to establish a rental value on the home using recent comparable properties that have rented in the area. Once we have reviewed the appraisals we will provide a written report on the property along with copies of the appraisals.

When the property is ready to be marketed for rent we use the services of a professional rental agency to look after all aspects of finding qualified tenants, ad preparation, lease preparation, property maintenance, repairs, bill payment, rent collection, and notices as required.

We will inspect the home a minimum of semi-annually with a full report and photographs (if necessary). As well we will do tenant management, including obtaining estimates for any necessary repairs, rent collection, bill payment and payment of non resident taxes.

Vacant Property Management

When your employees are transferred on a long-term assignment and the home is left vacant, our Vacant Property Management Services will provide long term maintenance and security of the property.

We will prepare an initial vacancy inspection report along with photographs of the home and report back on the condition of the home. We will ensure the home is visited every 48 hours in the winter months and twice weekly in the summer months, which complies with the insurance requirements and will ensure the property safety and security. We will arrange for the home to be winterized and/or de-winterized as required and maintain the property with lawn cutting and snow removal. If there are any problems noted we will obtain estimates from local independent contractors and submit them to the employee/corporation for consideration before ordering any work to be done. In the event that we have to secure the property due to break-in or that the home suffers a major problem, ie. The furnace doesn't work, we will get the work done and advise the employee/corporation immediately.

Tips on Selecting the right Relocation Company (whose services include Property Management)

As mentioned earlier, relocation involves several “mini projects”, but the main project is the timely selling and/or buying of a home. This involves making one of the most expensive decisions for most people. And **everyone wants a good deal**. Correct?

One way for you (and your employees) to get a good deal is to know a lot about the real estate market and the associated financial implications. Another way is to contact a reliable relocation company that has a long history and whom you can trust to provide you with information about the financial implications and can assist you (and your employees) to get the best deal.

The problem is that, today **there are several “relocation specialists” and so many real estate agents** and one gets confused as to who can provide excellent service, give the right information and also get you a good deal.



ABC Relocations

XYZ Relocators

In Today Out Tomorrow Moving Company

The Best Moving Group To
(Sorry...No Group Move Experience)

assist you (and your employees) to find out which relocation service provider will work in your employee's best interests, here are a series of questions which you (and your employees) should ask when evaluating a **prospective relocation service provider**.

So, here goes the test. If your evaluation with your current service provider results in a total of **less than 100%** in any category applicable to your employees, you need to find a relocation service company that would score a 100% - your assurance of excellent service and a good deal.

The 60-Point Test to Evaluate a Relocation Service Provider:

Do you have the following services provided as part of the Relocation Package?	Yes	No	Points
Program Management:			
Single Point of Contact			
Dedicated Account Management			
On-line client and employee web-sites			
Policy Consulting & Design			
Benchmarking			
Outsource Analysis			
Implementation			
Partner Meetings			
Supplier Network & Management			
Service Level Agreement			
Training			
Group Move Management			
Departure:			
Employee Counseling			
Guarantee Home Sale			
Marketing Assistance			
Amended Value/Buyer Value Option			
Equity Advances			
Property Management			
Appraisal Review only			
Mortgage Service			
Legal Service			
Closing Co-ordination Service			
Lease Cancellation			
Temporary Assignment Management			
Temporary Transfer Vacancy/Rental Management			
Expense Reimbursement			
Flexible Lump Sum or Capped Plan			
Move Management Household Goods			
Destination:			
Orientation			
Home Finding – Purchase			
Rental Finding			
Mortgage Service			
Legal Service			

Do you have the following services provided as part of the Relocation Package?	Yes	No	Points
Temporary Accommodation			
Purchase Closing Service			
Settling-in Service			
School Find			
Spousal Career			
Elder Care			
International Services:			
Pre-Departure Assessment, Planning & Preparation			
Needs assessment – focus on housing, schooling, language			
Cross-cultural Training			
Language Training			
Tax Planning			
Visa, Work Permits & Documentation			
Home Country Property Management			
Orientation – shopping, medical, schools, recreation			
Furniture, appliance purchase or lease			
Settling-in, banking, local business practices, customs, transportation, utility			
Repatriation Program			
Reporting & Financial Services:			
Budget Forecast			
Higher Housing Cost Analysis			
Comparable Value Report			
Rental Subsidy Report			
Cost of Living Report			
Mortgage Subsidy Calculation			
Taxable Benefit Tracking & Reporting			
Taxable Benefit Gross-up calculations			
Calculating allowances			
Reporting to Payroll			
TOTAL POINTS			

Memberships and Testimonials

Memberships:

- Real Estate Council of Ontario (RECO)
- Canadian Real Estate Association (CREA)
- Canadian Employee Relocation Council (CERC)
- Employee Relocation Council (ERC)

Testimonials:

Corporate:

...'extend my thanks to ABC both for delivering such a high level of caring and accurate service to my Company and to our employees....

...'time you take to ensure our transferees understand the process instills a level of confidence and comfort'

Policy... 'You have been able to accommodate any special requests we have made as well as being highly knowledgeable resource when we have encountered unusual situations. I particularly appreciated the assistance you have provided in the redesign of our entire relocation policy. '

Billing... 'It has been refreshing to receive such accurate and user-friendly invoicing with all backup included.'

Systems... 'online access to all of our file information has been wonderful. It has come to my rescue after hours on more than one occasion!'

International... 'take this opportunity to thank you and your staff for the efficient and personalized relocation services you have provided us and our relocating employees. Administering relocations Globally, especially in the USA, is an important requirement of our relocation supplier'

....'The level of service and sensitivity that our employees and their families receive is excellent and very much appreciated'

...'Your quality of service and attention to detail, as well as speedy handling of our special requests has added to our success.'

...'thank the staff at ABC for the effort put forth, ensuring the relocation needs of our employees are met. The efficient and personalized relocation services you have provided are greatly appreciated'

...'I have contacted ABC several times with what I felt were impossible or unreasonable requests and each time they have been able to meet my needs'

Would you recommend ABC to another Company?without hesitation – They are a very highly service-oriented Company and we have been extremely happy with the relationship' Scale 1 to 5 – rated 5'

Would you recommend ABC to another Company -...'They have my vote...and yes I would'...'.....Exceptional professional and service orientated.' Scale 1-5 rated 5.

...the level of service and sensitivity in which our employees and their families were handled is much appreciated. Your quality of service and attention to detail has added to our success...

Employee Testimonials

..."amazing effort that you put into making me and my husband "the happiest couple to relocate"...Lucy Edwards – XYZ Restaurants of Canada Ltd.

..."I remember how our first conversation on the phone was and how I was so nervous, frustrated, and anxious all at the same time. The time that you took to create that relationship and rapport was just unheard of" ...Lucy Edwards – XYZ Restaurants of Canada Ltd.

..."Thanks and a thousand thanks to all the people that helped our move be as painless as possible"...Lucy Edwards – XYZ Restaurants of Canada Ltd.

'...this is the second time you've relocated me and it's the second time that you made it a seamless experience. Thank you so much for taking such good care of me'

'...thank you for your hard work and continued support during the sale/purchase of our house, it was great to know that we could count on your assistance every step of the way. Our move went smoothly and we are all anxiously awaiting the start of school, thanks again'

'...thank you very much for all the hard work and personal attention you gave to me and my family during our recent move. We greatly appreciated the speed at which things were completed so that we could be settled before our son was born. All of your tips and advice were invaluable, and I thank you again. I hope if we ever have to move again we will have the pleasure of working with you,,,'

'...thanks for the excellent services you and your company provided me during my move.your services were nothing short of excellent. I could not imagine that a long-distance move could be so smooth and hassle-free....I appreciated your attention and advice as I attempted to determine where to plant my new roots'

...this was the best relocation I have experienced (this was my 6th). Everything was carried out seamlessly and helped minimize the stress of a move. Thank you!'

...Unfortunately there is not much we can recommend to improve your service. The level of service we received from both your company and those you referred to us was excellent. We could only wish to receive such service in other areas of our life! Thank you so much for making it all go so well'

'...We found everything extremely helpful and very courteous...'

'...thank you for all of your help, assistance, putting up with my questions and all the craziness that goes along with moving...'

'...everything was great and Louise was so much help and made this a good experience – thanks'

‘...you did everything right’

‘...you are doing a wonderful job, keep up the good work’

‘...thanks for everything that you did to help make our move a smooth one. It was nice to have someone as friendly as yourself there to help us out and explain everything we needed to know. We truly appreciate it, you are one of a kind.’

‘...your company was always there and made the whole moving process easier to deal with. Thank you’

‘...always willing to answer the numerous questions we had’

‘...everything went really smooth. No complications at all, we were very impressed with the organizing of the move and selling the house...’

‘...ABC – you have been more helpful and courteous than any of our other contacts, you promptly answered our questions. Your handling of both the sale and purchase of our homes was extremely superb. Thank you, you have made our move less stressful’

ABC Relocation Inc. is a proud supporter of:



Giving Hope Today
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Tony Fernández Foundation
A Foundation to benefit underprivileged children

