

SUCCESS STORY

Executive Relocation Specialists, Inc.

240 Fifth Avenue, Suite 817

New York, NY 10036

212-591-1717, www.ersirelocation.com

Having the right tools and resources at your fingertips is a crucial element of making smart decisions.



WELLGOOD WEALTH MANAGEMENT SAVES MONEY, TIME AND PRODUCTIVITY BY USING URSI

Wellgood Wealth Management (WWM) employs 270 people throughout the United States. The company handles at least \$300 million in assets for more than 400 clients. WWM is one of the most well-known and respected personal-finance advisors in the country.

On July 1, 2012, Julie Harrison, the new executive assistant to the COO of the San Francisco branch of WWM, was told that three of her company's executives were being permanently transferred to WWM's New York City headquarters. She was then assigned to coordinate and execute the personal aspect of each executive's move. All three—two of them married with young children—had to be settled into their new homes by August 17.

"I went straight into panic mode," Julie remembers. "How was I going to accomplish that—and do it well—within such a limited time period? And my boss, Tim, expected me to carry out my regular duties at the same time. My head was spinning!"

Finding the high-level employees places to live and arranging transportation for their possessions was just the tip of the iceberg. Meanwhile, it didn't help that Julie knew nothing about living in New York City and the surrounding areas.

Julie started out by pounding out e-mails to the three executives to request at least an hour of face time so she could find out each person's needs and desires regarding living in New York. The next day, all of the executives replied that their schedules were too jammed to meet with her anytime soon but to see what she could do with this information.

- ✚ Don Bander: An unmarried man who wants to live on Manhattan's Upper West Side, near Central Park.
- ✚ Zane Hudson: He and his wife need to live in a house in Westchester County so their three kids can be brought up in a suburban lifestyle. He also wants to join a country club that includes a pool, golf course and tennis courts.
- ✚ Mary Rivers: This single mother of a fourth-grader also requested an apartment or condo in Westchester, and in a town with a superb public school district.

Julie was horrified by the scant information she was left to work with. One slip-up on her part could prove disastrous. She then phoned WWM's manager of human resources for some—any!—advice. "Find a corporate relocation company," he told her. "They assist people who must uproot themselves—and usually their families—and move to another part of the country for their jobs." He recommended **Executive Relocation Specialists, Inc. (ERSI)**.

Julie immediately called ERSI, which teamed her up with Dean Welling, one of its Move Counselors. She explained her situation to Dean, who mapped out ERSI's services, the benefits of letting his company handle the three moves, and how it would save WWM significant amounts of

money, trouble and time. “An e-mail explaining the services you need and their financial advantages will be in your in-box when you arrive at work tomorrow,” he assured her. Julie’s sky-high stress level quickly plunged.

After reading Dean’s e-mail at 9 a.m. the next day, Julie confidently told her boss, Tim, about ERSI, what it could do for WWM and why she believed that having WWM handle all three moves would be a very wise choice. She left him a copy of the e-mail so he could read for himself the **cost-benefit analysis** that Dean had written up for Julie. Later that day, Tim gave her an enthusiastic go-ahead to hire ERSI.

ERSI TAKES ACTION

Dean contacted each member of WWM’s relocating trio—Don, Zane and Mary—and got them to take an hour from what Dean knew was their busy work days to find out specifics about what they needed and desired from their new living situations.

Armed with all of that information, Dean then started working with a handful of top Westchester and Manhattan real estate agents from his vast network of contacts. All of the agents prepared packages of information and overnighted them to Don, Zane and Mary.

Dean then compiled information about various aspects of relocation to Westchester County and Manhattan—such as school comparison information, the areas’ ambiances, nearby cultural and entertainment venues, houses of worship, communities’ goods and services, municipal facilities—and offered the WWM trio his expert suggestions and advice.

Moving is stressful, costly and reduces employee productivity. ERSI significantly decreased that stress and sustained the transferees' productivity by providing valuable departure and destination services, such as:

- pre-arrival consulting services from various specialty companies
- cost-of-living information and financial-impact studies
- household goods management
- regular updates on his step-by-step administration of the process
- cost-of-living analyses
- property tax details
- orientation to the new area
- assistance with schooling information
- settling-in support
- a single point of contact to handle all queries until the transferees' moves were completed
- spouse career counseling

The New York real estate agents' services included:

- area tours and counseling
- new-home searches
- mortgage assistance
- temporary living services
- new-home inspection services and warranty programs

ERSI specialists possess in-depth knowledge of relocation accounting, processing alternatives and IRS regulations; it ensures each client's

program remains in compliance, executes all financial transactions accurately and provides complete reporting.

“ERSI carefully devised a customized plan for my company and our employees,” says Julie. “Its expert services allowed me to concentrate on my regular duties and, at the same time, give my boss, my company, and our three transferees and their families peace of mind.”

SEAMLESS TRANSITIONS

ERSI’s expertly managed the relocation process from beginning to end, frequently providing WWM with expense-tracking updates. **ERSI’s services saved WWM \$25,000 in moving and real-estate agent costs, constant aggravation and an untold number of man hours.** Meanwhile, Don, Zane and Mary were able to concentrate on their jobs instead of the plethora of details regarding their moves.

- ✚ Don Bander now lives in a one-bedroom apartment on 77th Street and Central Park West. He runs two miles through Central Park four times a week and loves the neighborhood’s atmosphere.
- ✚ Zane Hudson, his wife and their three young children are happily settled in Westchester County’s prestigious Village of Irvington. Their four-bedroom home is on one acre, a mile from a full-service country club and a 10-minute walk to the train station.
- ✚ Mary Rivers and her fourth-grader are thrilled with their condo in Scarsdale, which has the highest-ranked public school system in the county. She and her daughter love spending time together in the town’s beautiful downtown district.

“ERSI has since managed several relocations for WWM. Thanks to their professional teams and vast pool of contacts and resources, all of our ‘relos’ were successful for both my company and my employees. ERSI played a crucial role in the achievement of our missions, and Dean went beyond the extra mile when providing service to our company, our employees and their families.”

— Ted Harbert, WWM manager of human resources

In an era of cost-cutting and tight budgets, ERSI assures its clients of transparency and total control over their relocation expenditures. Its specialists possess in-depth knowledge of relocation accounting, processing alternatives and IRS regulations. ERSI ensures each client's program remains in compliance, executes all financial transactions accurately and provides complete reporting.

ERSI AT A GLANCE

Summary: Executive Relocation Specialists, Inc., is headquartered in Manhattan and has branches in 11 other major U.S. cities, such as Chicago, Los Angeles, Miami and Seattle. Letting ERSI handle corporate relocations saves each client significant amounts of money, time and worry. ERSI is always at its clients disposal to answer any questions and requests.

ERSI is a full-service global relocation management company with over 20 years of success. It is a debt-free, privately held business that offer a broad range of integrated domestic relocation services that include such services as:

- **Consulting:** candidate services, group move, program development, industry trends/ benchmarking
- **Real Estate:** marketing, home disposition, closing, purchase, property management
- **Departure:** lease cancellation, letter of assignment
- **Household Goods Management:** transportation, storage, self-move assistance
- **Destination:** area orientation, temporary housing, travel coordination, settling-in
- **Financial:** expense management, allowances, tax assistance & payroll reporting, cap and budget management

Contact:

For more information about ERSI's services:

212-591-1717

info@ERSI.com

www.ERSIrelocation.com

NYSE: ERS