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Make Your Move Easier

Resources for U.S. Retiree Relocation

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Definitions

Brokers Market Analysis (BMA)	A real estate market analysis completed on your home by the selected real estate agents, which provides an overview of current market conditions, including recent sales and current listings of homes similar to yours. The BMA includes marketing strategies for selling your home and a suggested list price and anticipated sales price.
Domestic Partner	You are considered to have a registered domestic partner if you filed the <i>Chevron Affidavit of Domestic Partnership (F-6)</i> form with Chevron's Human Resources Service Center (time-sensitive restrictions apply).
Full Participation	The expectation that you will follow the requirements of the Chevron Relocation Program with respect to the placement of the broker-to-broker referrals in both your former work and new retirement locations, as well as following the program parameters as outlined in this program guide.
Home Finding Services	Chevron provides assistance to help you find a new primary residence in your new retirement location. Participation in the following features are required in order for you to receive reimbursement of home purchase closing costs: 1) placement of home purchase referral with a Chevron selected real estate agent, and 2) assistance with home purchase negotiations and contract review prior to submission of your offer to purchase a home.
Home Selling Services	Chevron provides a comprehensive marketing assistance program, required placement of listing of your home with a Chevron preferred real estate agent and referral made to the agent through your relocation consultant; assistance in contract negotiations with a buyer; and payment of all normal and customary home selling closing costs.
HUD Settlement Statement	A form provided by the title/escrow company at time of closing on your home that spells out all the seller and purchaser transaction costs. In some states this may be replaced by an attorney's settlement statement.
Miscellaneous Expense Allowance	A one-time cash payment provided at the beginning of your move to cover any non-specific miscellaneous expenses you may incur as a result of your relocation.
New Home Purchase Closing Costs	If you are a homeowner at your last work location and purchase a home in your new retirement location, Chevron will reimburse normal and customary home purchase closing costs including a pre-purchase home inspection (subject to certain restrictions).
Preferred Lender Program	Chevron has agreements with several preferred mortgage lenders you are encouraged to use to finance your home in your new location.
Primary Residence	The home/dwelling where you and your eligible family are currently residing full time as of the date of your retirement and identified as your homestead for real property tax, and principal residence for IRS tax reporting purposes. Subject to the definition of eligibility as identified in the "Home Selling Services" section of this document.
Relocation Management Company	Chevron has selected Brookfield Global Relocation Services (Brookfield GRS) to deliver the company sponsored relocation benefits to you. Brookfield GRS will assign approved suppliers to assist with your home selling, home purchase, household goods move, and so forth.

Relocation Consultant	An individual assigned by Brookfield GRS to work directly with you during your relocation. Your consultant will provide information, forms and advice to assist you through all phases of your relocation. It is important that you and your spouse/registered domestic partner maintain open and continuous communication with your consultant.
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Administrative

Congratulations on your retirement from Chevron. To facilitate your transition, Chevron provides the U.S. Retiree Program (Relocation Program) described in this guide. The Relocation Program is designed to assist you with many of the expenses of relocating as the result of your retirement.

Please take the time to read this information so that you understand all of the benefits for which you are eligible. We want to ensure your transition is a successful one.

Within certain sections of this guide we have included one or more of the following three notations. Please pay particular attention to these items:

CRITICAL NOTE:

This is an important policy element and you must be aware before taking action.

Cautionary Note:

This will help keep you on track during your relocation. Failure to follow the described procedure(s) and directions may result in a loss of benefit or your relocation going off track.

Administrative Note.

This is something that will necessitate you to take action.

Eligibility	<p>The provisions of the Relocation Program apply to all full-time exempt employees, who are eligible based on the requirements of the retiree program, and who relocated within the United States.</p> <p>In order to be eligible to receive the Chevron retiree relocation benefit, all of the following conditions must be met:</p> <ul style="list-style-type: none"> • You must have been age 55, or older, or had 30 years of service upon transfer to your current work location. • You must have been an exempt employee when transferred to your current work location. • You must have moved to your current work location under a Chevron, Texaco or ChevronTexaco relocation program in effect on the date of transfer. • You must be eligible for retirement with at least 25 years of service or 75 points at the time you request the Retiree Move assistance. • You must have worked in the current work location for a minimum of two years. • You must change place of residence at the time of the post-retirement move outside the current metropolitan area. • The distance from your old residence to your new retirement location must be at least 75 miles. • You must be moving to either: <ul style="list-style-type: none"> — The location to which you were previously assigned immediately prior to your late career move.
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	<ul style="list-style-type: none"> — A location of your choice provided the expenses reimbursed do not exceed the expenses of moving to the previously assigned location prior to your late career move.
Homeownership Status	Your homeownership status, in your work location, at the time you decide to retire, determines the relocation benefits for which you are eligible. You may not change this status, from a renter to a homeowner for example, via change in residence, marriage or by filing a domestic partner affidavit.
Family	<p>The Relocation Program also applies to your family. For purposes of this program, family is defined as your spouse or registered domestic partner, children and close relatives who meet all of the following requirements:</p> <ul style="list-style-type: none"> • Live with you when you give notice of your retirement. • Will live with you at your retirement location. • Qualify as dependent as defined by IRS guidelines. • Are financially dependent upon you, and are claimed by you on your federal tax return for the year prior to your approved relocation. • Domestic partners with whom you have filed the <i>Chevron Affidavit of Domestic Partnership (F-6)</i> form with Chevron's Human Resources Service Center prior to giving notice of your retirement. • If your spouse/registered domestic partner is also a Chevron employee and you are both being retiring, only one relocation benefit package is provided.
Direct or Indirect Benefit	You and members of your immediate family cannot directly or indirectly benefit financially from services or costs paid by Chevron related to your relocation. Chevron will not reimburse you; an immediate family member; or other relatives for any fees for services performed as a real estate agent or real estate broker for the sale or purchase of property, nor in the rental of a family home in the new work location.
Duration of Benefits	Unless otherwise indicated, all relocation services and expense submissions must be completed within 12 months of your retirement.
Your Responsibilities	It is your responsibility to understand the benefits to which you are entitled. Read this guide and be informed. It is expected that when full participation is required you will follow and support the policy as defined, including the placement of referrals on the Home Selling Services and Home Finding Service features. <i>If you choose not to participate you may not be eligible for certain features of the Relocation Program.</i>
Relocation Management Company	<p>Chevron has contracted with Brookfield Global Relocation Services (Brookfield GRS) to administer all relocation programs. Brookfield GRS is referred to throughout this text as the Relocation Management Company.</p> <p>Brookfield Global Relocation Services 1250 West Sam Houston Parkway, Suite 500 Houston, TX 77042 Telephone: 1-800-267-7573/Fax: 1-713-266-3896 Email: chevron@brookfieldgrs.com</p>
Initiating Your Relocation	To begin your relocation process, complete the online Chevron Relocation Authorization form. A link to the authorization form is found at http://hr2.chevron.com/relocation/gettingstarted/ . Your request will be sent to Human Resources for approval. Within 24 hours of receipt of Human Resources approval, your Brookfield GRS relocation consultant will contact you.
Your Relocation Consultant	Your relocation consultant will provide policy counseling, home marketing and home sale assistance, home purchase assistance, destination services, household goods movement

	<p>coordination and expense management. He or she is your advocate throughout your relocation.</p> <p>CRITICAL NOTE: Do not contact any real estate agents in either your current or your new location until you have submitted a Chevron Relocation Authorization form and you have been contacted by a relocation consultant.</p>
Relocation Expense Reimbursement	<p>All relocation expenses must be processed through Brookfield Relocation to ensure proper recording of your relocation expenses for tax reporting purposes. You should use the <i>Chevron Relocation Expense (GO-1390)</i> form found on the Relocation website or Forms Management website.</p> <p>Expenses should be documented by receipt/invoice for service and proof of payment.</p> <p>CRITICAL NOTE: You should not use your corporate card to pay for any relocation expenses, nor should you process any relocation related expenses (such as airfare, lodging or meals) through your Travel and Expense Accounting (TEA). Failure to follow this practice may result in unreported earnings and possible tax penalties to you and the company. Chevron will not assist with any such penalties if incurred.</p>
Tax Implications	<p>Chevron provides no tax assistance on the benefits received under the Retiree Program. Taxable expenses will be reported as income and taxes will be withheld.</p>
Updating Your Personal Information	<p>Administrative Note: You should change your home address as soon as possible after establishing a residence in your new location to ensure proper reimbursement of expenses. To make changes, contact the Human Resources Service Center at 1-888-825-5247.</p>
Additional Information	<ul style="list-style-type: none"> • Nothing in this material constitutes a contractual agreement between you and Chevron, either formally or implied. • All interpretations as to benefit eligibility and program application rest with Chevron HR Shared Services. • Chevron may eliminate, add or modify any relocation feature without notice, at any time, without reissuing this guide or notifying anyone to whom it has been given. • This guide does not cover every potential relocation scenario. If you are unsure of the application of benefits, contact your relocation counselor.

Miscellaneous Expense Allowance (MEA)

Your Miscellaneous Expense Allowance (MEA) is provided to assist you with expenses not covered elsewhere in the relocation. You are eligible to receive a MEA payment as long as you change your residence because of your retirement. If you decide to not retire after you having received your MEA, you must repay Chevron the full amount.

Your MEA is a half month's base salary, not to exceed \$7,500, less taxes.

You can request your MEA as soon as the first pay period after your retirement, or you may request that the Relocation Management Company pay your MEA payment up to 30 days prior to your retirement date.

Examples of expenses that might be paid for with the MEA include, but are not limited to:

- Driver's license and car registration fees.

- Hotel and meal expenses for extra days in your old location after your household goods have been packed.
- Temporary lodging.
- Household goods storage.
- Duplicate housing costs.
- Parking and tolls.
- Additional pet transporting and kennel costs.
- Nonrefundable annual club or membership dues.
- Forfeited cleaning or damage deposits for an apartment.
- Additional taxes you may incur as a result of your relocation.
- Installation or reconnection fees for telephone and cable service and utilities.
- Rental cars.
- Any relocation-related expenses you incur that are not covered under this policy.

Home Selling Services

Chevron will reimburse the costs of selling your home, including real estate agent commissions and normal and customary closings costs, within reimbursable guidelines.

Your relocation consultant will guide you through the home sale process, from getting your home ready for listing to sale, as well as helping you with all the details. Your relocation consultant will assist you with:

- Real estate agent selection assistance to ensure that you have a top performing agent working for you, who will help you understand current market conditions so you can list your home at a competitive price.
- Marketing strategy development and counseling on how to prepare your home for sale.
- Management and monitoring of your listing agent's marketing efforts.
- Assistance with assessing and negotiating all purchase offers.

Eligibility - Participation Rules	<p>Participation in the home selling services feature of the Relocation Program is not mandatory. The following participation rules apply to Home Selling Services:</p> <ul style="list-style-type: none"> • You must allow at least two real estate agents to complete a Broker Market Analysis (BMA) on your home. • The Relocation Management Company must make contact with the real estate agent(s) first, and be provided the opportunity to place a broker-to-broker listing referral. • The sale of your home must close within one year of your effective retirement date. <p>Note: Determination of your home's eligibility for any and all home sale benefits is solely at the discretion of Chevron HR Shared Services.</p>
Short Sale Transaction	<p>Should you chose to sell your home through a short sale transaction you will be ineligible for any company assistance.</p>
Real Estate Agent	<p>You must use a real estate agent approved by the Brookfield GRS if you are to be considered fully participating in the Home Selling Services feature of the Relocation Program.</p>

	<p>CRITICAL NOTE: Do not contact any real estate agents in either your current location or your new location before speaking to your relocation consultant. Your relocation benefits may be jeopardized if you do.</p>
<p>Broker Market Analysis (BMA)</p>	<p>Your relocation consultant will have two approved agents each develop a Broker Market Analysis (BMA) on your home. The BMA is a written market analysis that compares your home to similar homes in your area that have recently sold and to homes that are currently on the market. Using comparative data, each agent will develop a marketing plan that will include advice on preparing your home for sale, a range of values for listing purposes and a most probable sales price.</p> <p>Your relocation consultant will then review the BMAs with you. This will assist you in establishing a list price which that balances maximizing your sale price while minimizing the time it takes to sell your home.</p>

Direct Reimbursement of Home Sale Closing Costs

Once the sale of your home has closed, you will request reimbursement through your relocation consultant for eligible seller's closing costs, including customary real estate commission; not to exceed 7 percent. No buyer closing costs will be reimbursed. You must close within one year of your effective retirement date.

Administrative Note:

Reimbursement will be paid less all applicable taxes.

Typical Closing Costs

Based upon normal and customary seller's closing costs on a conventional home sale, the following is a list of expenses eligible for reimbursement. This is not intended to be a complete list. Chevron reimbursed closing costs may vary depending upon geographical location:

Reimbursable	
• Document preparation fees (deed)	• Real estate commission (normal and customary for the area)
• Document transfer tax	• Recording fees
• Excise tax / intangible tax / mortgage tax	• Releases
• Inspections (only as required for state and county certifications)	• Tax stamps (city, county, state as applicable) or tax certifications
• Name search	• Title endorsements / search / abstract
• Notary fees	• Title insurance (owner's coverage only)
• Overnight mail or express service fees	• Wire transfer fees
Non-Reimbursable	
• Assessments	• Mortgage insurance
• Attorney fees (non-local custom)	• Mortgage interest proration
• Code compliance charges	• Mortgage prepayment penalties

<ul style="list-style-type: none"> • Flood insurance 	<ul style="list-style-type: none"> • Property tax proration
<ul style="list-style-type: none"> • Home warranties 	<ul style="list-style-type: none"> • Repairs
<ul style="list-style-type: none"> • Home owner association dues or fees 	<ul style="list-style-type: none"> • Trash or sewer proration

Home Finding Services (HFS)

Home finding services (HFS) are provided to help you find a home that best meets your needs in the shortest amount of time. All services are provided by Brookfield GRS and its partners.

Homeownership Status	Your homeownership status, in your work location, at the time you decide to retire determines the relocation benefits for which you are eligible. You may not change this status, for example from a renter to a homeowner, via change in residence, marriage, or by filing a domestic partner affidavit.
Full Participation	<p>Full participation in HFS is a requirement to receive home purchase benefits.</p> <p>You are required to:</p> <ul style="list-style-type: none"> • Use a real estate agent referred to you by your relocation consultant. • Close within 12 months of your effective retirement date
Home Inspections – New Home	Chevron will reimburse you up to \$500 for a general home inspection.
Building a Home	If you decide to build a home at your new location, you will be reimbursed for one set of final customary closing cost expenses when your home is completed and ready for occupancy. You are responsible for construction loan fees or any other additional expenses for land purchase or construction. You are also responsible for any costs for construction and related financing. Expenses must be submitted for reimbursement within one year of your retirement date.

Chevron Approved Lenders

Chevron has negotiated contracts with four nationally recognized lenders to provide a broad range of mortgage services to you. These contracts help Chevron reduce the expense of closing costs and other fees, while providing you access to mortgage expertise. When working with a Chevron approved lender, you'll receive the benefits of:

- Preferred relocation interest rates; often below retail rates.
- Various loan products.
- Dedicated Chevron team familiar with our Relocation Program.

CRITICAL NOTE:

If you select a lender other than one of the Chevron approved lenders, you will be reimbursed for only some of your closing costs (see Non-Approved Lenders).

Financing Home Purchase Closing Costs through the Chevron Approved Lender	<p>When you finance through one of the Chevron approved lenders, Chevron will pay the following closing costs, on the first/primary mortgage:</p> <ul style="list-style-type: none"> • State transfer fees. • Escrow fees.
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	<ul style="list-style-type: none"> • Fees for lender required inspections. • Normal and customary attorney fees. • Normal and customary recording fees. • Appraisal. • Credit report. • Loan processing fee/commitment. • Flood zone determination. • Tax service fee. • Construction loan fee. • Lenders/final inspection fee. • Normal and customary escrow or closing fees charged by the title company (not including items such as taxes and insurance that must be deposited into escrow accounts in advance). • Title insurance or fees for examination of title as required by the lender. <p>Cautionary Note: <i>In Texas and some other states, title insurance is a seller's expense, so it is not a reimbursable cost. Some new home contractors show this as a buyer's cost directly on the purchase agreement. However, this does not change the fact that the title insurance is a seller's expense which is not eligible for reimbursement.</i></p>
<p>Financing With an Alternate Lender</p>	<p>You can finance your home purchase with any lender you choose. However, the reimbursement you receive will be based on the negotiated rates charged by the Chevron approved lenders. You are responsible for any fees over the negotiated rate which can vary significantly by lender.</p> <p>Chevron will reimburse you for the same fees as described above, with the exception the following fees that Chevron will not reimburse:</p> <ul style="list-style-type: none"> • Appraisal or credit report • Loan processing fee/commitment • Flood zone determination • Tax service fees • Construction loan fee • Lenders/final inspection fee • Closing costs for second mortgages
<p>Reimbursement of Expenses</p>	<p>Complete the <i>Chevron Relocation Expense (GO-1390)</i> form and attach a copy of the certified HUD-1 closing statement and receipts for the pre-purchase appraisal and any inspections. Forward the completed report and documentation to your relocation consultant for processing.</p>

	Reimbursement of reasonable buyer's closing costs for a given geographic area may vary depending on location. If you have any questions, view the full list of items that are typically reimbursed, and those that are not reimbursed, on the Chevron Relocation website at http://hr2.chevron.com/relocation/buying/closingcosts.asp .
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Travel to New Location

If the distance from your last work location to your new retirement location is 400 miles or less, you will be reimbursed for travel to your new work location using your personal automobile.

If the distance from your current work location to your new retirement location is greater than 400 miles, you can either drive your personal automobile(s) or you will be reimbursed for economy class airfare.

If you precede your family to the new retirement location, you may drive or fly to your new location. Once your family is ready to join you in the new location, your family is also eligible to drive or fly to your new retirement location. Only one final travel expense per family member will be reimbursed.

Note: only one Chevron paid household goods shipment will be made.

When you drive your personal vehicle to your retirement location, your final travel expenses are reimbursed as follows:

- Mileage at the current Chevron reimbursement rate.
- Meals on a per diem basis: \$30 for you and your spouse/registered domestic partner and \$15 for each eligible dependent traveling with you.
- Actual and reasonable lodging expenses to include one night at your old location, travel days, and one night at your new location based upon driving a minimum of 400 miles a day by the most direct route.

If you fly to your retirement location, you will receive reimbursement for reasonable, 21-day advance purchase, economy airfare for the most direct route of travel.

Shipment of Automobiles and Transit Options:

Chevron will reimburse mileage on two vehicles driven to your new location. If you have at least one additional licensed driver in your family relocating with you, Chevron will reimburse the mileage on a third vehicle that you or a family member drives to your new location.

Alternately, Chevron will pay to ship a maximum of two vehicles provided the distance from your current work location to your new retirement location is greater than 400 miles. (You may still drive a third vehicle if you meet the accompanying licensed driver requirement and you will be reimbursed for mileage on that vehicle.)

Note: You should speak with your relocation consultant to discuss your personal circumstances and to understand what would be eligible for travel reimbursement prior to your final travel to new location.

Travel Restrictions	<p>The following travel restrictions apply:</p> <ul style="list-style-type: none"> • When needed, Chevron will reimburse you the cost of hotel lodging for one night at your old work location and one night upon arrival at your new location. • If you stay with friends or relatives en route, lodging costs or host gifts will not be reimbursed. You may, however, claim the meal per diems, if applicable, for you and each eligible dependent traveling with you. • Reimbursement of meal per diems and lodging expenses will be based on the assumption that you have driven an average of 400 miles per day by the most direct route, even if you chose to vacation en route to your new location. • All other incidental travel expenses are covered by your MEA.
Pets/Livestock	<p>You are expected, when possible, to move your household pets in your personal vehicle(s). Chevron will reimburse you for the cost of transporting up to two household pets (a maximum of \$350 total). This includes airfare, container rental, transportation costs or hotel pet fees. You are responsible for making all pet shipment arrangements.</p> <p>Expenses for the shipment of livestock, farm animals, or pets other than those residing in your home are not reimbursable. If you drive to your new location and tow a livestock trailer, you will be reimbursed an additional \$.08 per mile.</p>

Household Goods Movement

Chevron has agreements with two professional moving companies to provide a full-service move including packing, moving and unpacking your household goods. Your household goods move will be assigned to one of these movers by the Relocation Management Company. Only one shipment of household goods is provided per relocation. If your eligible dependents temporarily remain at your old location, only one Chevron paid household goods shipment will be made.

To start the move process you should:

1. At a minimum of three weeks before your move, complete a *Request for Movement of Household Goods (GO-1405)* form and fax it to (888) 894-7931 or email it to chevronhhgs@brookfieldgrs.com.
2. Include the name of your Human Resources business partner and your CAI on the form.

Cautionary Note:

Chevron does not endorse the practice of moving goods yourself in a self-haul trailer or van (such as U-Haul). In addition, Chevron does not reimburse the rental fees or mileage costs of a self haul provider.

Weekend pickup and delivery is not allowed without prior approval from BU management based on business need.

<p>What can be Shipped</p>	<p>Most normal furnishings can be shipped; however, Chevron Global Relocation has sole discretion in making shipment determination for questionable items.</p> <p>Some examples of excluded items are listed, but not limited to:</p> <ul style="list-style-type: none"> • Ammunition, flammables, aerosols, paint and impractical articles such as food, alcohol and wine, plants and shrubbery, lumber and firewood, gazebos, satellite dishes, dog kennels, fencing, miscellaneous outside structures such as outdoor playscapes, swing sets, forts, or other playground equipment. • Trailers, campers (including pop-ups), please refer to the “Vehicles” section for self towed trailers; etc. • Aircraft of any size • Watercraft over 14 feet or which will not fit in the moving trailer <p>Cautionary Note: <i>Neither Chevron, nor the carrier, will assume responsibility for the shipment of furs, jewelry or currency, articles of sentimental value, collections such as stamp, coin or baseball cards, or important papers or documents. We recommend you carry such possessions with you during your final travel or make other appropriate arrangements for shipment. If you choose to ship these items, you will be doing so at your own risk.</i></p>
<p>Shipment of Small Loads</p>	<p>If the total of your personal goods weigh 300 pounds or less, you should make arrangements to ship them via a parcel service (such as UPS, USPS, or Greyhound). Chevron will reimburse you for the reasonable shipping costs including insurance to cover any loss or damage.</p>
<p>Inventory of Goods</p>	<p>All items valued at \$100 or more must be individually listed on a Valued Inventory form and submitted to your relocation consultant <i>before</i> shipment in order to receive full replacement value insurance.</p> <p>The shipment of firearms may be restricted by the carrier at their discretion. Typically handguns and pistols will not be shipped. If you are allowed to ship firearms, you must include the make, model, serial number and dollar value on the Valued Inventory form.</p> <p>For high-value items such as antiques, rare books; rugs/tapestries, or artwork, you must be able to verify the value claimed with purchase documents or professional appraisals which must be submitted to the carrier prior to your move. Any appraisal cost will be at your own expense.</p>
<p>Insurance of Goods</p>	<p>Full replacement insurance on your household goods is provided through the carrier, up to \$100,000. If additional valuation coverage is needed, you may purchase this through the carrier at your own expense.</p>
<p>Vehicles</p>	<p>The following provisions apply:</p> <ul style="list-style-type: none"> • If your current work location and your retirement location is less than 400 miles apart you are expected to drive any personal vehicles and receive mileage reimbursement (per Final Move Travel). • If your current work location and your new retirement location is greater than 400 miles apart, you may drive up to two vehicles and receive reimbursement for mileage (refer to “Travel to New Location” section), or you may ship up to two vehicles. • In addition to shipping two automobiles, you may also ship up to two

	<p>additional motorized vehicles, which may include (but not limited to): motorcycles, scooters, ATVs, or golf carts, for example. Commercial, business or farm equipment, and motorized vehicles of excess size (as determined by Chevron Global Relocation), are prohibited. If there are any questions, you must discuss this with your relocation counselor before date of shipment.</p> <ul style="list-style-type: none"> • You may ship only one riding lawn mower. • Shipped vehicles must be operable and you must have valid vehicle insurance at the time of shipment. • Chevron will not ship or arrange to ship classic cars or motor homes. You will be reimbursed for mileage at the current Chevron rate if the classic car or motor home is one of your two eligible vehicles. Your relocation consultant can calculate a mileage reimbursement quote. Chevron will not assume responsibility for loss or damage to these vehicles. • Mileage for self-towed vehicles, including trailers, will be reimbursed at \$.08 per mile. • Personal effects cannot be packed inside vehicles that are shipped. Neither Chevron nor the carrier will assume responsibility for any items left inside your vehicle.
Secondary Pickup	<p>A secondary pickup of personal items (that you own) and wish to consolidate with your shipment is permitted if they are stored within 50 miles of your residence. This is a one-time benefit provided only when your primary shipment is being loaded. Provide the complete address of the second pickup location on the <i>Request for Movement of Household Goods (GO-1405)</i> form.</p>
Extra Delivery	<p>You may choose to take a partial delivery of your personal items to your interim residence. The remainder of your items will be placed in temporary storage at your expense. The goods must be segregated at your origin residence before loading on the moving van. There is no provision for storage, access to storage or partial delivery from storage. All associated costs will be billed directly to you.</p>
Packing/Delivery/Unpacking	<p>You or a designated representative must be present during the packing, loading and at the time of delivery. The carrier will prepare an inventory of all items being shipped. Discuss the condition of particular items and any special handling needs with the driver. Only the carrier's representative (surveyor or driver) will make final decision as to what items require custom crating. Make additional comments on the inventory, as necessary. Keep your copy of the carrier's inventory and bill of lading in your possession during your transition, and have them with you at your new location. Use your copy of the carrier's inventory to check off each item as it is unloaded. Note damaged or missing items on the carrier's inventory.</p> <p>You may unpack some articles yourself, however you must immediately document (take pictures if possible) any damage and leave it in the packing paper and carton that it was packed. Do not discard any items for which you will claim damage. If have any safety concerns (such as broken glass), please contact your carrier's move coordinator for assistance.</p> <p>Cautionary Note: Failure to follow these rules may jeopardize your ability to successfully file a claim with the carrier. If you any concerns, call the carrier's move coordinator immediately. Don't wait until after the move to report problems.</p>

	<p>After delivery, the carrier will make one trip to your home to pick up packing materials such as paper and boxes. Any additional debris pick up will be at your expense.</p> <p>Chevron and the carrier are not responsible for items that you pack, ship or place in storage on your own.</p> <p>Maid service is not provided, however, if desired, the carrier can arrange for this service at your own expense.</p> <p>The household goods carrier will provide you a post move survey to complete. Please return the survey as soon as possible. The amount the carrier bills Chevron for your move will be based, in part, on the rating you provide on the survey.</p> <p>Normal appliance servicing is provided at your old and new locations. This does not include purchase or installation of new material such as new vents, wiring, and tubing. Only those appliances serviced at your old location will be serviced at your new location. Any items disassembled by the carrier at your old location will be reassembled in your new location.</p>
<p>Loss and Damage Claims</p>	<p>Claims for lost or damaged goods must be filed with the carrier within six months of the date of delivery. Due to differing state regulations, filing periods for intrastate moves vary. Please follow the direction given by your move coordinator when filing a claim.</p> <p>You should carefully examine all your household items when unpacking. You can only file one claim for lost or damaged household goods items with the carrier, per move. Notify the carrier immediately if damage to your home or residence occurs. Claims for property damage must be filed directly with the household goods carrier within 24 hours of delivery. The carrier will repair or replace lost or damaged goods, for which they are deemed responsible, totaling \$100 or more. Loss or damage claims estimated to be less than \$100 are not reimbursable.</p> <p>Once notified of property loss or damage, the household goods carrier will provide you with a loss and damage claim form. A carrier's representative will contact you to schedule an appointment to view the broken or damaged items.</p> <p>Until the carrier's representative has inspected the damaged items, do not discard and do not purchase replacement items you assume cannot be repaired. The carrier will not pay claims for discarded or replacement items.</p> <p>Whenever possible, damaged items will be repaired. For items that cannot be repaired, the carrier will reimburse you for the full replacement value of a comparable item if the item is included on your Valued Inventory form, was packed by the carrier, and is listed on the household goods carrier's inventory. Please note that the carrier is entitled to salvage rights.</p> <p>A separate claim must be filed with the household goods carrier for damage to vehicles.</p> <p>The carrier will not assume responsibility for internal functions of electronics and appliances because their condition before shipment cannot be verified. This includes stereos, televisions, washing machines and computers.</p> <p>If you have any problems resolving a claim, contact your relocation consultant.</p>

<p>Moving Charges paid by Chevron</p>	<p>In addition to packing your household items, the household goods carrier will perform the following:</p> <ul style="list-style-type: none"> • Normal labor and service call charges for disconnection or reconnection of appliances. This does not include new vents, wiring or tubing that may be necessary to reconnect these items. • Preparation for shipment, and reassembly at delivery, of grandfather clocks. • Disassembly and reassembly of pool tables. • Piano movement.
<p>Your Responsibilities</p>	<p>It is your responsibility to:</p> <ul style="list-style-type: none"> • Have all items accessible to the carrier. Items in crawl spaces, attics, garage rafters, and similar areas should be brought to an accessible area in your home. Note: Assistance can be arranged with the carrier at your own expense. • Remove fencing, as necessary, for the carriers to access items. • Take down any items affixed to a wall or ceiling that are considered permanent fixture, such as draperies and drapery rods; mounted TV or stereo systems (if specifically excluded from your property sale). • Disconnect/Reconnect chandeliers and ceiling fans. • Disconnect/Reconnect and drain hot tubs and water beds. Note: Any associated expense for plumbers, electricians and carpenters is at your own expense. • Disassemble/Reassemble gas stoves, portable basketball goals and trampolines. • Disassemble/Reassemble items such as bookcases, shelving or other units. • Assemble any items that were not disassembled by the carrier prior to the move. • Prepare computer items for shipping (such as dissembling of desktop from peripherals). Note: Shipping insurance does not cover software or content, only hardware. • Dispose propane or butane tanks as shipment is not permitted. • Alter the placement of furniture after initial placement by the carrier. • Pay for any structural alterations required to access household goods items, such as removing doors or windows. • Pay the cost to reconfigure the way refrigerator doors open. • Ensure your goods fit into your new house. Chevron will not pay for hoisting of furniture because it will not fit through a normal casement or stairwell; or due to desired placement within the home. <p>This is a general list meant to be used as a guide and is not all-inclusive. If you encounter situations which are not addressed, contact your relocation consultant for clarification.</p> <p>Note: <i>Crating of items is addressed on an individual basis and approval must be given to the carrier prior to the service being performed. If the carrier does not recommend crating of a particular item, but you still request the service, you will be responsible for all charges.</i></p>
<p>Taxes</p>	<p>The payments made by Chevron to the household goods carrier are not taxable, and therefore not reported as income.</p>

Mobile Homes	<p>If you are moving your primary residence mobile home to your new location:</p> <p>Chevron will arrange separate shipment of your household goods as detailed in the “Household Good Shipment” section of this policy.</p> <p>You must obtain two bids for the transport and transportation insurance of your mobile home. You will be reimbursed actual customary moving costs including transport, escort fees, setup fees, insurance and permits based on the lower of the two estimates.</p> <p><i>Chevron does not reimburse utility connects or disconnects.</i> Eligible expenses will be reimbursed by submission of a <i>Chevron Relocation Expense (GO-1390)</i> form. Attach copies of both bids and submit to your relocation consultant.</p>
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Taxes

Many Relocation expenses reimbursed by Chevron have a tax liability. Keep in mind that neither Chevron nor your relocation consultant can advise you on your personal tax situation. It is recommended that you consult a professional tax adviser who is familiar with relocation tax rules.

Timing	All <i>Chevron Relocation Expense (GO-1390)</i> forms must be received by Brookfield GRS by the year-end cutoff date in order for expenses to be reimbursed in that year. Your relocation consultant can provide you with cutoff date information.
Tax Assistance	Chevron does not tax assist benefits received under the Retiree Program. All applicable taxes will be withheld from reimbursements.
	<p>Chevron will withhold the necessary tax amounts to the appropriate federal, state and local authorities in the tax year your benefits were reported or paid. Even so, depending upon your individual circumstances, these withholdings may not be sufficient to cover your actual tax liability. Any additional tax liability is your responsibility.</p> <p>Chevron cannot advise you on your personal tax situation. A professional tax adviser should be consulted.</p>
Updating Your Personal Information	<p>Administrative Note: To avoid withholding of dual taxes from your paycheck, it is important to update your home address information as soon as possible after establishing a residence in your new location. You should also change your medical and dental providers, if appropriate. To make these changes, contact the Human Resources Service Center at 1-888-825-5247, or go to the U.S. Human Resources site and make the appropriate changes.</p>