

Epic

welcomes you to

MADISON

START-UP FUND RESOURCES





Welcome

You've just stepped into one of the most exciting communities in America – packed with restaurants, entertainment, events, and cultural attractions that appeal to nearly every taste. Madison consistently wins awards for its livability (Livability.com's 2014 '#1 in Top 100 Places to Live'), education, cycling trails (USA Today Travel's 2014 '#4 Best Cycling Towns'), & eco-friendliness (Nerdwallet's 2014 '#1 Greenest City in America'). We're sure you'll enjoy all that Madison has to offer and we hope you're excited to make Madison your home.

We also understand that relocating can be a significant financial commitment, and Epic is happy to provide assistance to our new developers. This guide will help you understand the Start-Up Fund, plan your move, figure out what your tax exempt expenses might be, and familiarize yourself with the Madison area.

We're excited for you to be joining the Epic team!

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Start-Up Fund Information

The Start-Up Fund is \$10,000 to help cover the cost of relocating to and starting up at Epic.

To receive the Fund you will need to sign and return your Start-Up Fund Agreement (this will be mailed to you and is available on HR Connection) during your first week of employment. During that first week you will receive the Fund either by paper check or direct deposit.

The amount of the Fund that you spend on qualified deductible moving expenses (set forth by the IRS) will be tax exempt. The remainder of the Fund will be taxed. You have until the middle of your first month of employment to submit your Start-Up Fund Grid and corresponding qualified deductible moving receipts. If needed, you may request a one-month extension and submit your receipts by the middle of your second month of employment.

The amount of the Fund that will be subject to tax depends on the total qualified expenses you submit. **You should estimate taxes at about 40%.**

Examples of how taxes are applied and how submitting deductible moving expenses can lower your tax liability can be found on page 5.

In the event that you should choose to leave Epic within your first year of employment, you will be required to repay Epic up to the total amount of the Fund. If you should leave Epic within your second year of employment, you will be required to repay Epic for up to half of the amount. In all cases, the amount of any reimbursement required may be deducted from your paycheck.

Unsure if your expenses are qualified? Include them on your Start-Up Fund Grid and you'll be contacted if anything needs to be updated.

Qualified Deductible Moving Expenses: A Crash Course

	Hotels/Lodging	Transportation	Movers & Shipping	Moving Helpers	Miscellaneous
Expenses that ARE typically considered a qualified expense	Hotels en route to Madison for you & your moving helper(s), 1 night in town of origin, 1 night in Madison (if not booked as temporary housing)	Mileage for personal vehicle, gas for rental vehicle, 1-way airline ticket to Madison, return flight/bus ticket for eligible moving helper(s)	Moving company (including packing, loading, transport, unloading, unpacking & tips), rental of moving truck, shipping boxes via FedEx, USPS, UPS, etc.	Transportation & hotel for up to 2 people who are directly assisting with your relocation to Madison (driving additional vehicles, loading/unloading, etc.)	Boxes, packing materials (such as bubble wrap), tape
Expenses that ARE NOT considered a qualified expense	Temporary housing stay(s) in Madison, hotel in town of origin in excess of 1 night	Trips for apartment hunting, rental cars in Madison or town of origin in excess of 1 day, roundtrip flights for self or anyone permanently relocating with you	Shipment costs for new furniture or delivery of new belongings, hiring more than 1 moving company	Expenses for more than 2 helpers, flights that return the helper(s) somewhere other than their place of origin	Food, weather appropriate clothing, cleaning supplies, buying out of current lease, purchase of new furniture

For more information on what the IRS considers qualified, visit
<http://www.irs.gov/pub/irs-pdf/p521.pdf>.

FAQS: Start-Up Fund & Moving

Is gas for my personal vehicle considered tax exempt?

Either mileage OR gas purchased en route to Madison for your personal vehicle would be a qualified, tax exempt expense. Mileage is set by the IRS and is intended to cover the cost of fuel and wear & tear on your vehicle. For rented vehicles, only the cost of gas is considered qualified; remember to save all of your receipts if you'll be using a rental vehicle on your journey.

My family/friends are helping me move. Should I include their expenses?

Based on how you move to Madison, expenses for up to two moving helpers may be considered qualified and tax exempt. Please include these expenses on your Start-Up Fund Grid and save all receipts. You will be contacted if any changes need to be made.

How do other employees move to the Madison area?

How you relocate is up to you; you'll want to consider where you're moving from, what you need to move, and when you're starting. Below are some scenarios:

1. Anna lives on the east side of Madison area but wants to move downtown to be closer to Epic. *She does not meet the time and distance test set forth by the IRS and therefore won't have any qualified deductible moving expenses. The total amount of the Start-Up Fund will be taxed.*
2. John is moving from New York with some personal belongings, small appliances, and next to no furniture. He does not have a vehicle. *He could fly to Madison from New York and ship the rest of his belongings via USPS/FedEx/UPS. All of these expenses would be considered qualified and therefore tax exempt including the costs of boxes & shipping materials.*
3. Kenny is moving from New York with his personal belongings & furniture from a one-bedroom apartment. He has a car. *He could rent and drive a U-Haul and his parents could drive his personal car to Madison. They could stay in two separate hotel rooms en route and his parents could fly back to New York from Madison once they were done assisting with the move. All of these expenses would be considered qualified and therefore tax exempt including mileage for his personal vehicle & gas for the U-Haul.*
4. Stacy is moving from New York with her husband and two children from a three-bedroom house. Their family has two cars. *She could hire a moving company to pack their boxes, relocate their belongings to Madison, and unpack their boxes. She could ship one car and drive the other to Madison. She and her family could stay in a hotel en route to Madison. All of these expenses would be considered qualified and therefore tax exempt including mileage for her personal vehicle and tips to the movers.*

On average, how much is rent?

Rent varies depending on a variety of factors: apartment location, size of apartment, amenities, and the number of roommates (if any). Some unofficial data about Madison and surrounding area apartment rental prices can be found at www.apartmentratings.com.

Where are the best places to live?

We require all employees to live within 45 minutes of Epic, but other than that, it's up to you! We believe that anywhere in Dane County is a great place to live. Communities closest to Epic would include (but are not limited to) Fitchburg, Middleton, West/Downtown Madison, Verona, Mount Horeb, and New Glarus.

Start-Up Fund Scenarios

You will receive \$6,000 of your Start-Up Fund as an advance on your second day of employment.

Epic will contact you 1 – 2 weeks prior to your start date to determine if you wish to have the \$6,000 direct deposited or issued as a paper check.

Any remaining portion of the Fund due to you will be paid out near the end of your first month of employment.

Scenario One

Anna lives on the east side of Madison but wants to move downtown to be closer to Epic.

\$10,000	.....	Start-Up Fund
0	.....	Total of qualified deductible moving expenses <i>(Moving company, shipping boxes, flights, etc.)</i>
\$10,000	.....	Amount to be taxed (taxed at ~40%)
\$4,000	.....	Estimated Taxes Due

Since Anna received \$6,000 as an advance and owes around \$4,000 in taxes, she'll receive a check or direct deposit near the end of her first month of employment of around \$0.

Her pay stub will show the \$10,000 Start-Up Fund, the amount of taxes due (~\$4,000), the \$6,000 advance, and the minimal remainder of the Fund due to her.

Scenario Two

Kenny is moving from New York with his personal belongings, furniture from a one-bedroom apartment, and vehicle. He's shipping all of his items and flying to Madison.

\$10,000	.....	Start-Up Fund
\$5,000	.....	Total of qualified deductible moving expenses <i>(Moving company, shipping boxes, flights, etc.)</i>
\$5,000	.....	Amount to be taxed (taxed at ~40%)
\$2,000	.....	Estimated Taxes Due

Since Kenny received \$6,000 as an advance and owes around \$2,000 in taxes, he'll receive a check or direct deposit near the end of his first month of employment of around \$2,000.

His pay stub will show the \$10,000 Start-Up Fund, the amount of taxes due (~\$2,000), the \$6,000 advance, and the remaining portion of the Fund due to him.

If Kenny needs the additional \$2,000 prior to the end of his first month, he should contact his Start-Up Fund Coordinator.

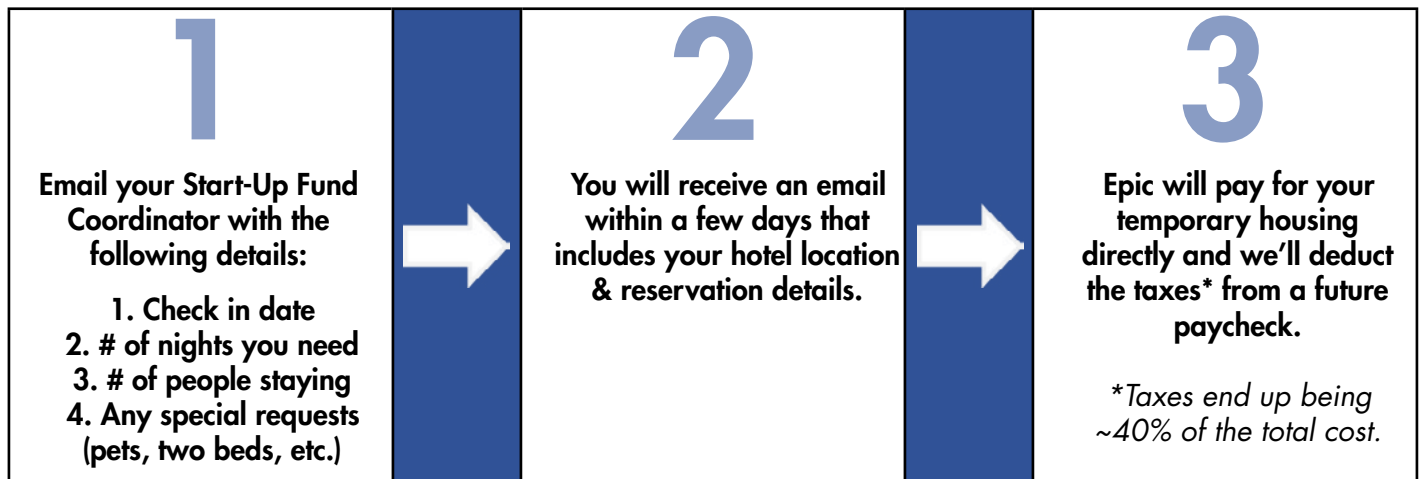
FAQS: Temporary Housing/Hotel Stays

If you need it, Epic will provide you with up to **14 nights of temporary housing/hotel stays** in Madison.

Epic will arrange and pay for this directly, so please contact your Start-Up Fund Coordinator.

You may use it all at once or in multiple visits (apartment hunting, first moving to the area, additional room for a moving helper, etc.). *Please note: The IRS requires Epic to treat temporary housing costs as income and withhold taxes for these costs.*

How to Arrange Temporary Housing/Hotel Stays



Why am I being taxed on my temporary housing stay?

Per the IRS, temporary housing is considered a benefit to the employee that must be taxed. You will pay taxes on the cost of the room as if the cost were paid to you. For example, if your total stay was \$500, Epic would pay for that directly. On a future paycheck you would see additional tax withholding on that \$500. You would end up paying about 40% of the total stay in taxes, or roughly \$200 in the example above. The additional taxes will be withheld from a future paycheck, depending on the timing of your stay.

Can my significant other or moving helpers use my temporary housing?

Yes. If they are helping you find an apartment, permanently relocating with you, or directly assisting with your move they are eligible to stay. Please note that you will need to book their stay, just as you would for your own stay, as temporary housing through your Start-Up Fund Coordinator. If you book a room for them and a separate room for yourself – both on the same night, it will be counted as two nights towards your 14 night total.

When in doubt, ask your Start-Up Fund Coordinator.

Start-Up Fund Coordinators are very familiar with the area and are more than willing to answer any questions you may have about Epic's Start-Up Fund or the Madison area.



The following pages contain resources to help you find and establish your new residence in the Madison area. You'll also find useful information about utilities, changing your address, and updating your driver's license and vehicle registration.

Finding Housing: Renting

Apartment Search Tools

- [Madison Apartment Living](#)
- [Madison Campus & Downtown Living](#)
- [Apartment Showcase](#)
- [Start Renting](#)
- [Abodo](#)
- [Padmapper](#)

Large Leasing Companies

- [Madison Property Management](#)
- [Steve Brown Apartments](#)
- [CCL Management](#)
- [Rouse Management](#)
- [BMC Management](#)
- [JSM Properties](#)
- [Urban Land Interests](#)

Subleasing Resources

- [UW Sublets](#)
- [Madison Craigslist](#)

Click on the resource name to visit its website

Tips from the Locals

Covered parking and the cost of utilities are things to consider as you're apartment hunting. To get an estimate of the average energy use for your apartment, check out **Madison Gas and Electric's Website**.

Downtown Madison leases typically run from August 15th to August 14th. If you're trying to find a lease in the off-season, you may need to look into subleasing options. The Madison Craigslist page is a great place to start.

If you'd like to get a better sense of the relative safety of the area you're considering living in, you can see a map reflecting police incident reports **here at the City of Madison website**.

Finding Housing: Buying

Home Search Tools

- MLS Listings
- Zillow
- Realtor.com
- Trulia

Large Real Estate Companies

- Restaino & Associates
- First Weber Realty
- Stark Company Realtors
- Lake & City Homes
- Keller Williams Realty

Click on the resource name to visit its website

Want to compare local school districts before you start your search for the perfect home? Check out the Wisconsin Department of Public Instruction website.



Getting Settled

Changing your Address

It's a good idea to have a forwarding address in place so your mail isn't lost in the transition. You can put a forwarding address in place online at www.usps.com or by visiting your local post office. You'll also want to update the address you have on file with:

- Banks/Credit Unions
- Credit Card Companies
- Magazines
- Former Employers
- Insurance Companies
- Current Utility Providers
- Cell Phone Providers

Setting Up Utilities

You may need to set up utilities in your new home (electric, cable/satellite, internet, etc.). Before you set up your utilities, check with your leasing office, landlord, or real estate agent as to which services are applicable for your specific home. Some apartments will already have services set up and included in the cost of your monthly rent.

Provider	Charter	TDS	Dish Network	Direct TV	AT&T	Comcast
Services Offered	Cable Internet Phone	Cable Satellite Internet Phone	Satellite TV Internet	Satellite TV Internet	Digital TV Internet Phone	Digital TV Internet Phone

Getting Settled

Getting a Wisconsin Driver's License

Driver's licenses are issued by the Wisconsin Department of Motor Vehicles. Drivers new to Wisconsin are required to apply for a Wisconsin license within 60 days of establishing residency. That said, some of the documentation that you may need to get a driver's license must be at least 30 days old.

To obtain a Wisconsin driver's license with a valid out-of-state license, you must apply at a DMV Service Center and complete an application. A list of DMV locations, the driver's license application, as well as a list of items you'll need to bring with you when you apply for your license in person can all be found on the DMV website.

Registering Your Vehicle

You'll need to display Wisconsin license plates within two days of moving to Wisconsin (you don't need a WI driver's license to register your vehicle). You can register your vehicle by completing an application at a DMV service center or by submitting materials by mail. For more information, visit the DMV website.

Registering to Vote

The Wisconsin Voter Information Center will help you navigate the registration process and tell you where your polling place is located. In most cases, you'll need to complete an application and supply proof of residency (typically a Wisconsin driver's license or utility bill).

Locating a Post Office

To locate the post office nearest to you, visit www.usps.com. FedEx and UPS locations in the area are listed on their respective websites.

Locating a Place of Worship

To locate a church, synagogue, mosque, etc., near you, visit www.findachurch.com.



Food & Shopping

Grocery & Specialty Stores

(click here to see a map view of the stores listed below)

Grocery Stores

- Woodman's: Enormous and reliably inexpensive; employee-owned.
- Copps: Consistent selection and quality with convenient locations.
- Metcalfe's Sentry: Quality produce, excellent deli and prepared foods selection
- Hy-Vee: Low prices, quality produce, and lots of "grab n' go" options available
- Miller & Son's: "Mom and pop" family operation; good selection and friendly staff
- Whole Foods Market: Best selection of gourmet, organic, and all-natural foods
- Trader Joe's: Gourmet for less!

Specialty Stores and Bakeries

- Brennan's Market
- Willy Street Co-op
- Seafood Center
- Barriques Wine Cave
- Fraboni's Italian Deli
- Candina's Chocolates
- Fromagination
- Greenbush Bakery
- Clasen's European Bakery
- La Baguette
- Bloom
- Silly Yak Bakery/Bread Barn
- Craig's Cakes
- La Brioche

Restaurants

- The Daily Page: Reviews of most Madison area restaurants
- Madison Dining: Reviews and "best of" lists for Madison restaurants
- Eat Drink Madison: Search restaurants by keyword, category, or location
- Madisonatoz.com: Eating in Madison A-Z

Shopping

(click here to see a map view of the stores listed below)

Malls & Shopping Centers

- West Towne Mall
- East Towne Mall
- Hilldale Mall
- Greenway Station
- Westgate Shopping Center
- Prairie Towne Center

General Shopping

- Target
- Costco
- Sam's Club
- Shopko
- Wal-Mart

Other Retail Resources

- Mad Tools: A comprehensive list of resources from *The Isthmus'* Daily Page
- Madison Magazine's "Best of Madison" List: The "best of" everything from restaurants to pet stores
- City of Madison Website
- Greater Madison Convention and Visitors Bureau
- Greater Madison Chamber of Commerce

View a list of discounts available to Epic employees by logging into the HR Connection Website.

For more information about activities, events, and culture in Madison, check out the Hitchhiker's Guide to Madison on HR Connection.

Parking and Travel

Parking

Downtown Parking

Within the Capitol Square and the isthmus, downtown streets are a crowded jumble of one-ways and “no parking” zones. There are five downtown public parking ramps (rates around \$1/hr with evening specials) and plenty of metered parking.

Meters are enforced from 8am-6pm Monday-Saturday. Outside those hours, street parking is free. To find out which parking ramps have car charging stations, how to obtain a parking permit, special event parking information and more, visit www.cityofmadison.com/parkingutility.

Winter Parking

Outside the immediate isthmus area, alternate side parking is enforced from November 15– March 15, regardless of weather conditions. This means that if you’re parking overnight on the street and tomorrow’s date is an even date, park on the even side of the street. If tomorrow is an odd date, park on the odd side of the street. Failure to do so could result in a ticket.

If you are parking in the immediate downtown area, alternate side parking does not go into effect **unless a snow emergency is declared**. You can check the City of Madison website to find out if there is a snow emergency.

Travel

Public Transportation

The Madison Metro has extensive bus routes serving much of Madison. It also has two bus lines running to and from Epic on the weekdays. Plan your trip by bus at the Madison Metro website. **You can purchase your bus pass directly from Epic using pre-tax dollars.**

- Route 55 runs between the West Transfer Point and the Epic Campus
- Route 75 is an express service from the Capitol Square to Verona and the Epic Campus

Biking

- City of Madison Biking Resources and Dane County Bicyclists Map
- Ride On Wisconsin

Bus Services to Other Cities

- Badger Coaches: Buses to Milwaukee and Minneapolis
- Van Galder: Buses to Chicago and surrounding area, Janesville, and Minneapolis
- Megabus: Buses to Chicago and Minneapolis

Taxi Services

- Union Cab: (608) 242-2000
- Badger Cab: (608) 256-5566
- Madison Taxi: Order online at www.madtaxi.com
- Green Cab: (608) 255-1234

Nearby Airports

- Dane County Regional Airport (MSN): located on the northeast side of Madison
- General Mitchell International Airport (MKE): Milwaukee, Wisconsin
- O’Hare International Airport (ORD): Chicago, Illinois
- Midway International Airport (MDW): Chicago, Illinois