



Tax Information Form

Please complete the following information according to your current tax status (not to be confused with your W-4 payroll withholding status) and send this form to your Odyssey consultant. This information is necessary to calculate the tax consequence of your relocation benefits. If any of your responses change during the course of your move, please report those changes to your relocation consultant.

Employee Name: _____

New Monthly Base Salary: _____

Will you itemize on your Federal Tax Return? (check one) Yes ☐ or No ☐

Filing Status: Your Current Tax Year Filing Status (check one):

- ☐ Single
- ☐ Married filing jointly
- ☐ Married Filing Separately
- ☐ Head of Household

Exceptions: Indicate number of exemptions claimed when filing your IRS form 1040
(check all that apply and enter total number):

- ☐ Yourself
- ☐ Spouse
- ☐ Dependents age 16 or under
- ☐ Dependents age 17 or over

Total Exemptions: _____

Authorized Signature: _____

You will receive a Relocation Tax information form and detailed accounting of all relocation expenses paid on your behalf in the January following your move.

Complete and return to:

Odyssey Relocation Management

27271 Las Ramblas, Suite 120

Mission Viejo, CA 92691

Fax: (714) 800-1918