



Mobilizing our heroes

KPMG Global Mobility Services



Military families move ten times more often than civilian families. In addition to the burden that comes with frequent relocations, veterans and military spouses have unique challenges—one of which is understanding the complex tax implications.

With this challenge in mind, KPMG has developed a specialized approach to support the military families within your organization. Your organization can demonstrate your commitment to creating a workplace that is inclusive and supportive of all employees. This serves as a tangible benefit that can help your organization attract and retain top talent from the veteran and military spouse communities, which can bring unique skills and perspectives to your workplace.

Program overview

“Mobilizing our heroes” is a service grounded in empathy designed to assist organizations to navigate the unique challenges and complexities associated with relocating veteran and military spouse employees. “Mobilizing our heroes” can provide tax and payroll support during the relocation process, both to the relocating military family and your organization. This will help ensure a smooth and successful transition for the employee’s family, and will help your organization maintain payroll reporting and withholding compliance.



What to consider

Employee



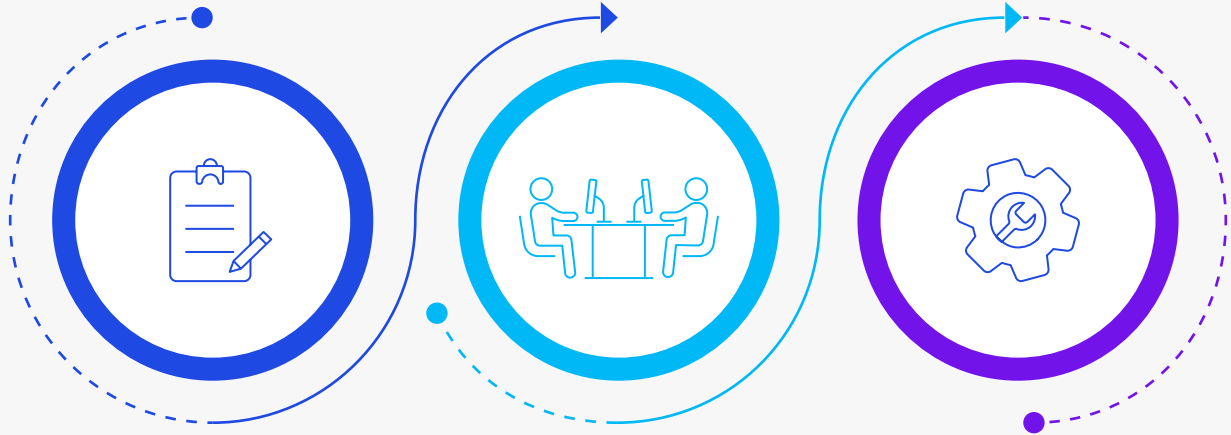
- What is the Military Spouses Residency Relief Act (MSRRA), and what does it mean for me?
- Where is my resident state for tax purposes?
- Am I obligated to pay tax in the state where my post is, my previous resident state—or both?
- In which states am I obligated to file tax returns?

Employer



- Does the relocation impact our reporting and withholding obligations?
- If the relocation impacts our obligations, where should we now be reporting and withholding?

How it works



Assess

KPMG will schedule a consultation with the relocating service member or military spouse employee to understand their unique facts and circumstances.

Advise

KPMG will advise the employee and your organization if the service member or military spouse qualify for treatment under certain legislation (e.g., MSRRA), and frame “what it means” for them.

Action

Employee benefit: KPMG will educate the employee on the relevant legislation and provide them with the necessary tools to make informed decisions related to their tax residency position and filing obligations.

Organization benefit: KPMG will provide specific payroll reporting and withholding instructions to help ensure both compliance and a positive employee experience.

Contact us

Bob Mischler
Lead Principal, Tax
Global Mobility Services
T: 212-872-3174
E: rmischler@kpmg.com

Joel Goodsell
Senior Manager, Tax
Global Mobility Services
T: 617-988-1618
E: joelgoodsell@kpmg.com

David Mayes
Principal, Tax
Global Mobility Services
T: 617-988-1083
E: dmayes@kpmg.com

Gretchen Wilkinson
Principal, Tax
Global Mobility Services
T: 713-319-2707
E: gmwilkinson@kpmg.com

Sean Del Plato
Senior Associate, Tax
Global Mobility Services
T: 617-988-1219
E: sdelplato@kpmg.com

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

kpmg.com/socialmedia



The information contained herein is of a general nature and based on authorities that are subject to change. Applicability of the information to specific situations should be determined through consultation with your tax adviser.

© 2023 KPMG LLP, a Delaware limited liability partnership and a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved. The KPMG name and logo are trademarks used under license by the independent member firms of the KPMG global organization. NDP476302-1A