

ELIGIBLE FOR THE BENEFIT:

- ◆ ACTIVE PARTICIPANTS
- ◆ ACTIVE PARTICIPANTS' SPOUSES AND DEPENDENTS
- ◆ DEPENDENTS OF
 - ⇒ EARLY RETIREES
 - ⇒ NORMAL RETIREES
 - ⇒ PERMANENTLY DISABLED
 - ⇒ SURVIVING DEPENDENTS

NOT ELIGIBLE FOR THE BENEFIT:

- ◆ EARLY RETIREES AND SPOUSES
- ◆ NORMAL RETIREES AND SPOUSES
- ◆ THOSE ON PERMANENT DISABILITY AND SPOUSES
- ◆ SURVIVING SPOUSES

DEPENDENTS ARE DEFINED AS SINGLE CHILDREN WHO ARE NOT ACTIVE IN FULL-TIME MILITARY SERVICE AND:

1. UNDER THE AGE OF 19, OR
2. FULL-TIME STUDENTS UNDER AGE 25 AND IN AN ACCREDITED SCHOOL OR COLLEGE

RECEIVING THE BENEFIT

TO RECEIVE REIMBURSEMENT, YOU MUST HAVE THE RECEIPT FOR PAYMENT FOR THE TUITION OR COURSE FEE.

AFTER COMPLETING THE HIGH-SCHOOL SCHOOL YEAR OR SECONDARY EDUCATION SEMESTER, FILL OUT A TEWF EDUCATIONAL REIMBURSEMENT BENEFIT CLAIM FORM AND SUBMIT IT WITH THE TUITION RECEIPT AND PROOF OF CLASS COMPLETION (A COPY OF THE GRADE OR A PASS/FAIL NOTICE) TO THE ADDRESS BELOW. CLAIMS RECEIVED BY THE FUND OFFICE MORE THAN 12 MONTHS AFTER COMPLETION OF THE COURSE WILL NOT BE CONSIDERED.

YOU MAY OBTAIN AN EDUCATION REIMBURSEMENT BENEFIT CLAIM FORM BY WRITING OR CALLING:

**TOLEDO ELECTRICAL
WELFARE FUND
P.O. Box 60408
ROSSFORD, OH 43460
419-666-4450**

WWW.ELECTRICALFUNDS.ORG
BENEFITS@ELECTRICALFUNDS.ORG



TOLEDO ELECTRICAL WELFARE FUND

**I.B.E.W LOCAL No. 8
NECA-OHIO/MICHIGAN CHAPTER**

**P.O. Box 60408
ROSSFORD, OHIO 43460
PHONE: 419-666-4450
FAX: 419-666-5410**

EFFECTIVE: AUGUST 1, 2006



THE EDUCATIONAL REIMBURSEMENT BENEFIT

UPDATED: 1-2010

In Memory of John McKeand

THE EDUCATIONAL REIMBURSEMENT BENEFIT PROVIDES TUITION REIMBURSEMENT FOR QUALIFYING EDUCATIONAL PROGRAMS. THIS PROGRAM AIMS TO INSURE THAT MEMBERS HAVE THE OPPORTUNITY FOR PROFESSIONAL DEVELOPMENT, AND THAT THEIR CHILDREN HAVE THE OPPORTUNITY TO GO TO COLLEGE.

ELIGIBILITY

THIS BENEFIT WILL BE EFFECTIVE FOR COURSES COMMENCING ON OR AFTER AUGUST 1, 2006.

ELIGIBILITY IS ESTABLISHED BY COMPLETING 24 CONSECUTIVE MONTHS OF TEWF PARTICIPATION. ONLY COURSES STARTING AFTER THE MEMBER HAS ESTABLISHED ELIGIBILITY WILL BE CONSIDERED FOR REIMBURSEMENT. FOR EXAMPLE, YOUR 24 MONTHS OF CONTINUOUS ELIGIBILITY ENDS ON OCTOBER 1ST; ONLY COURSES THAT BEGIN AFTER OCTOBER 1ST WILL BE ELIGIBLE.

A YEAR FOR THE EDUCATION PLAN RUNS FROM AUGUST 1 TO JULY 31.

REIMBURSEMENT BENEFIT

THE AMOUNT OF REIMBURSEMENT IS BASED ON THE PARTICIPANT’S ELIGIBILITY STATUS AND VARIES BY TYPE OF EDUCATIONAL PROGRAM.

	Eligible Active Participant	Eligible Spouse	Eligible Dependent
Private Highschool	Not Eligible	Not Eligible	50% of Annual Tuition
Vocational School	Not Eligible	\$60 per Credit	\$75 per Credit
College	\$60 per Credit* (JATC-approved)	\$60 per Credit	\$75 per Credit
Adult Education	\$60 per Course (up to 2 courses per year)	\$60 per Course (up to 2 courses per year)	Not Eligible
Maximum Annual Reimbursement	\$500	\$500	\$2,500
Maximum Lifetime Reimbursement	\$2,500	\$2,500	\$12,500

***THIS WILL NOT REIMBURSE THE MEMBER FOR THEIR REQUIRED APPRENTICESHIP CLASSES. HOWEVER, IF THE MEMBER IS WORKING ON HIS ASSOCIATES OR UNDERGRADUATE DEGREE IN CONJUNCTION WITH HIS AP- PRENTICESHIP, REIMBURSEMENT IS AVAILABLE FOR THOSE ADDITIONAL COURSES. TYPE II SFBF/VEBA MAY BE USED FOR APPRENTICESHIP CLASSES.**

REIMBURSEMENT WILL ONLY BE PROVIDED FOR EDUCATIONAL COURSES TAKEN FOR CREDIT FROM AN ACCREDITED SCHOOL OR COLLEGE — AUDITING A CLASS AND COURSES RELATED TO HOBBIES, EXERCISES OR LEI- SURE ACTIVITIES DO NOT QUALIFY FOR REIM- BURSEMENT. FURTHER, REIMBURSEMENTS WILL ONLY BE MADE IF THE GRADE RECEIVED

IS A “C” OR HIGHER. FOR PASS/FAIL COURSES, A “PASS” MUST BE RECEIVED.

FEES OR COSTS FOR BOOKS, SUPPLIES, TRANSPORTATION, HOUSING AND MEALS IN- CURRED BY AN ELIGIBLE RECIPIENT IN CON- NECTION WITH COMPLETING A COURSE ARE NOT COVERED EDUCATIONAL EXPENSES.

TAX INFORMATION

EDUCATIONAL REIMBURSEMENTS ARE CONSIDERED TAXABLE INCOME. YOU WILL RECEIVE A 1099 FOR ANY MONIES RECEIVED. SOME COURSES FOR ELIGIBLE ACTIVE PARTICIPANTS MAY BE NON-TAXABLE.