

EDUCATIONAL ASSISTANCE APPLICATION INSTRUCTIONS

- Section I of the application applies to the Teamsters Local Union No. 727 member who is a participant in the Legal and Educational Assistance Plan. You become a participant in the Plan on the first day of your fourth month of Covered Employment. Please note that Covered Employment means that you are working under a contract that requires your employer to make contribution payments to the Legal and Educational Assistance Fund on your behalf.
- The Plan requires that you be a participant for at least two months prior to the start of the student's school year to be eligible for Educational Assistance benefits. This means that if the school's academic year began in August of 2023 you must have started working in covered employment March of 2023 to be eligible for benefits for the 2023-24 school year. Your covered employment must also continue without interruption throughout your school's entire academic year.
- **Your school's academic year begins on the first day of classes, in the Fall Semester, and will be considered to have ended on the last day of the last summer term.**
- Section II of the application applies to the student. This individual may be a plan participant or their eligible dependent. A dependent is your spouse or your unmarried child that is under age 27 on the last day of your school's academic year and who is dependent on you for maintenance and support. Please see the Summary Plan Description for the full definition of "Dependent Child." To receive benefits, you must enroll your dependents with the Fund Office.
- The applicant must provide an Official Transcript demonstrating the successful completion of a minimum of **24 semester hours, or 36 quarter hours**, during your school's academic year at an accredited college or university. **The student's official transcript(s) must be sent directly to the Fund Office by the college or university. An official transcript may also be sent, by the college or university, via email to: info@727benefitfunds.com. We must receive the official transcript(s) no later than September 3, 2024.** Participants working for a **contributing** employer may be eligible for benefits if they earn at least 12 semester hours, or 18 quarter hours during your school's academic year at an accredited college or university.
- A school is considered accredited if it is accredited by the North Central Association or one of its regional affiliates. Additionally, students enrolled in approved schools of mortuary science, such as the Worsham College of Mortuary Science, are eligible to participate in this program.
- **The purpose of the Plan is to reimburse Participants and their eligible dependents for their out of pocket expenses** incurred in the serious pursuit of a college degree. As such, you **must** provide documentation showing that you actually incurred out of pocket expenses in this school year. You can obtain a record of your expenses incurred and payments made for eligible expenses; **tuition, mandatory fees and lab fees**, from the college or university. The Plan will provide a book allowance of \$500.00 to each student that meets all of the Plan's requirements for the payment of benefits. This eliminates the need to provide receipts for books that are

purchased by students. **Please note that you may send your completed application and other documentation via email to: info@727benefitfunds.com.**

- Any financial aid such as grants and scholarships will be deducted dollar for dollar against any expenses incurred for tuition, mandatory fees and lab fees. Applicants must submit receipts for expenses incurred during your school's academic year, **by September 3, 2024.**
- **Please note that the Fund Office will not accept deliveries from Federal Express or other non-union carriers. If an overnight delivery service is needed, we suggest you use a Teamster company such as UPS or DHL.**
- The Trustees are making a maximum of **\$3,000,000.00** available, to plan participants, for reimbursement of tuition, mandatory fees and the cost of books. In no case, will any individual receive more than the amount spent for qualifying expenses less the amount of any scholarships, grants, and other types of financial aid that they receive from any source.
- The Plan requires that you submit your application and all other required documentation to the Fund Office no later than **SEPTEMBER 3, 2024.** Unfortunately, as required by Federal Law, we are unable to approve applications that do not meet the Plan's requirements.