

EDUCATIONAL ASSISTANCE APPLICATION INSTRUCTIONS

- 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 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.
- 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 1, 2026. Participants working for a contributing employer (and their spouse) 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.
- 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.
- 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 1, 2026**.
- 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.
- For eligibility questions please refer to the Summary Plan Description or the Legal and Educational tab on our website (www.727benefits.com).
- The Plan requires that you submit your application and all other required documentation to the Fund Office no later than **September 1, 2026**. Unfortunately, as required by Federal Law, we are unable to approve applications that do not meet the Plan's requirements.
- 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.