

Ancestry.com Inc.

Education Expense Reimbursement Program Policy

INTRO

The following policy has been created as a benefit to assist employees pursuing degrees through accredited education programs or who are pursuing certifications. The classes, degrees or certifications must be approved, *in advance*, by the employee's manager, prior to the course start date. In some cases, including graduate level courses, the classes, degrees or certifications being pursued must be job-related or company-related.

This document will outline the requirements for eligibility, the tuition reimbursement process, the reimbursement amounts available, and options for non-standard training expense reimbursements.

Employees are responsible for submitting paperwork as specified in this document. Failure to do so will result in denial.

REIMBURSEMENT ELIGIBILITY

Employment Eligibility

To be eligible to receive tuition reimbursement, employees must be active and employed for the full duration of courses.

Expenses paid through grants or scholarships are **not eligible** for reimbursement, but tuition expenses paid through student loans are eligible. If an employee receives a scholarship or grant that covers tuition but not required textbooks, that employee is eligible to receive reimbursement **only** for the required textbooks.

Expense Eligibility

Eligible items for reimbursement include (but are not limited to) the following:

- Tuition
- Lab/class fees
- Required text/software expenses
- Entrance exam fees

Ineligible items for reimbursement include (but are not limited to) the following:

- Parking fees
- Testing center fees
- Late Fees
- Application fees
- Supplies/Optional software
- Non-required text expenses

Questions on eligibility should be directed to the Human Resources representative. To be eligible for reimbursement, the employee must achieve a grade of "C" or better for undergraduate courses or a grade of "B-" or better for graduate courses ("C-" or lower, and "B" or lower are ineligible

respectively). All classes must be pre-approved by the employee's manager.

Tuition Reimbursements are calculated per course date completion schedule, (please see table 1).

Events Resulting in Ineligibility

An employee will not be eligible for tuition reimbursement if he/she withdraws from a previously approved course or the course is canceled.

An employee will not receive tuition reimbursement if their employment ends prior to completion of an approved course.

Terminating after receiving graduate level reimbursement

Reimbursed expenses for **graduate level** courses may become the employee's sole responsibility in the event that employment ends within six months of when a reimbursement was paid. If employment ends between six and twelve months from the date of reimbursement, the employee will be responsible for returning, to the Company, 50% of the reimbursement paid.

Eg. Employee receives \$3,000 tuition reimbursement on January 30 and then terminates on June 29, the employee would owe (to Ancestry.com) \$3,000.

If an employee terminates after more than 6 months, but less than 12 months after receiving reimbursement, the amount to be returned would be pro-rated based on the number of full months between the reimbursement date and the termination date.

Eg. Employee receives \$3,000 tuition reimbursement in January. If the employee terminates from July-December, he or she would owe a pro-rated amount of the \$1,500.

$\$1,500/6 \text{ months possible} = \$250 \text{ per month remaining to full year from reimbursement}$ The schedule below shows what the employee would owe if he/she termed in that month:

<u>Employee Terminates between:</u>	<u>Amount Owed to Ancestry:</u>
July 30-Aug 29	1500
August 30-September 29	1250
September 30-October 29	1000
October 30-November 29	750
November 30-December 29	500
December 30-January 29	250
January 30 and after	0

APPLICATION AND REIMBURSEMENT PROCESS

Prior to courses beginning, employee must fully complete the *Education Expense Reimbursement Application* (located on the Ancestry.com Intranet).

A completed application consists of the following:

- Employee first and last name
- Course names and credit hours listed
- Employee signature and date
- Authorized signature by employee's manager
- All authorized dates and signatures are *prior* to the course start dates
- Authorized dates listed that are after course start dates are cause for denial

Once employee has completed the application as outlined above, employee must submit the application completed in its entirety and include: checklist, official summary of charges from Institution, grades with course descriptions, tuition reimbursement form to HR representative by "*forms due to HR*" deadline (see table 1).

Grade Report (or Unofficial Transcript from Institution) must include the following:

- Student Name
- Institution Name
- Semester
- Course names and letter grade for each course
- Course names on grade report or unofficial transcript, must match course names listed on original application. (*Courses not matching original application will not be reimbursed*)
- Number of credits for each course

Official Summary of Charges from Institution must include the following:

- Student Name
- Institution Name
- Semester
- Charges (tuition, student fees, lab fees, late fees, etc.)
- Payments (loans, credit card/check, etc.)
- Credits (Pell Grant, Financial Aid, Grants, Scholarships)

Employee must attach all items as back up to the Tuition Reimbursement Form. If items are not attached, application will be denied.

After employee has electronically submitted all items with Tuition Reimbursement application and Tuition Reimbursement Form to the HR department, an HR representative will review, approve and submit to payroll for payment processing.

Refer to the table to see what month your final course completion date falls between and have all items approved and submitted to HR by the deadline listed. Once grades and tuition receipts are received by a Human Resource representative, the tuition reimbursement will be issued on the last open payroll

of the month indicated in the pay schedule table (as calculated by the payroll representative according to all policies outlined in this document).

Tuition Reimbursement Pay Schedule			
Course Date Completion:	January 1 – Apr 30	May 1 – July 31	August 1 – December 31
Forms* due to Human Resources	June 1 st	September 1 st	February 1 st
Payroll Payment Date	June 15 th	September 15 th	February 15 th

(Table 1)

* Full documentation should be submitted electronically to tuition@ancestry.com

REIMBURSEMENT AMOUNTS

The following schedule reflects eligibility for this benefit based on full-time/part-time status, and number of years of completed service on course *end* date. The benefit amounts are *per calendar year* amounts. A calendar year is defined as January- December.

	<u>Undergraduate courses</u>	<u>Graduate courses</u>
Full-time	0 Months-1 Year: \$1250	0 Months-1 Year: \$2500
Employees	1-2 Years: \$1500	1-2 Years: \$3000
	2-3 Years: \$1750	2-3 Years: \$3500
	3+ Years: \$2000	3+ Years: \$4000
Part-time	0 Months-1 Year: \$625	0 Months-1 Year: \$1250
Employees	1-2 Years: \$750	1-2 Years: \$1500
	2-3 Years: \$1000	2-3 Years: \$2000
	3+ Years: \$1250	3+ Years: \$2500

Once the maximum eligible amount is met in the calendar year (Jan-Dec), an employee will not become eligible again until:

1. He/she reaches another eligibility amount due to months of service

Eg. Sam, a full-time employee in his 4th month of employment at the time of his payout in January, is reimbursed for his \$1,250 eligible amount. Sam submitted grades in November for additional reimbursement. Because he is now in the 1-2 year category, Sam is eligible for a total of \$1,500 for the calendar year (an additional \$250 to the \$1,250 he was already paid in May). Sam receives \$250 in November, bringing his calendar year total to the eligible \$1,500.

2. A new calendar year is started on January 1.