



SelectQuote Cares Tuition Reimbursement Program

Overview:

SelectQuote Cares is proud to offer the SelectQuote Cares Tuition Reimbursement Program ("Program") to aid in your career development and personal growth. Under this Program, SelectQuote will reimburse each eligible employee for 90% of covered expenses, up to a maximum of \$5,000 per calendar year, for continuing education through an accredited program that either offers growth in an area related to his or her current position or that may lead to growth opportunities within SelectQuote. Employees will also be limited to a lifetime reimbursement of \$30,000 under this program.

In order to receive reimbursement the employee must:

- (1) be [Eligible to Participate](#)
- (2) successfully complete all [Course Completion Requirements](#), and
- (3) submit all [Documentation Required for Reimbursement](#).

Complete procedures for applying for and requesting reimbursement are set forth below.

Eligibility to Participate:

1. **12 month tenure with SelectQuote:** SelectQuote Employees with at least 12 months of tenure, who have been in good standing with SelectQuote for the 3 months prior to seeking approval, will be eligible to participate in the Program.
 - a. HR will have sole discretion of whether an employee is in good standing per SelectQuote standard HR definitions, and
 - b. Employee remains in good standing per SelectQuote standard HR definitions through the date the reimbursement request is submitted, complete and in full.

2. **Relevant coursework:** Students must enroll in a related area of study at an accredited institution at the college level or above.
 - a. **Related area of study** - Employee must enroll in a course of study which either offers growth in an area related to the employee's current position or which may lead to potential opportunities within SelectQuote.
 - i. Examples of coursework that will not be approved may include, but are not limited to:
 1. Cooking class
 2. Woodworking class
 3. Physical education class
 - b. **Accredited institution** - [SEARCH](#)
 - c. **Undergraduate/Graduate classes only; no high school classes.**
3. **Submit Program Application:** Employee must submit an application ([Tuition Reimbursement Application](#)) to enter the Tuition Reimbursement Program at least 2 weeks prior to the start of the covered class.

Course Completion Requirements

Employee must earn a passing grade:

- For letter graded courses, a grade of "B-" or higher,
- For non-letter graded courses, a result that indicates the course was successfully completed (such as "P", "Satisfactory", or course completion certificate).

Grade verification: The employee will be required to submit an **official grade report** issued by the educational facility, either on the facility's letterhead or including the facility's logo. The grade report must indicate the employee's name, the course title, the date(s) or time period of the course, and the grade received.

Documentation Required for Reimbursement

1. **Tuition Statement** - the employee must submit an **official tuition statement** issued by the educational facility showing the cost per credit hour and a listing of fees or identifying the tuition and fees by class name. Documentation must itemize the costs of the requested course(s) to be reimbursed and by what payment method the tuition and fees were paid (check, credit card, ACH, loan, grant, scholarship, etc.). Cancelled checks or credit/debit card statements will not be accepted as verification of tuition costs.

2. **Receipts for Covered Expenses** - Itemized receipts for all [covered expenses](#), and
3. **Proof of meeting the Course Completion Requirements** - The employee must submit an electronic copy of the ***official grade report*** issued by the educational facility, either on the facility's letterhead or including the facility's logo. The grade report must indicate the employee's name, the course title, the date(s) or time period of the course, and the grade received.

Covered Expenses:

SelectQuote will reimburse 90% of an employee's covered expenses for educational assistance, up to a maximum of \$5,000 per calendar year. Covered expenses include any and all of the following expenses, unless specifically excluded below:

- Tuition
- Registration Fees
- Required Textbooks
- Course Related Fees, such as:
 - Lab Fees
 - Exam Fees
 - Online/Technology/Distance Learning Fees

Excluded costs: Other than textbooks, SelectQuote will not include in covered educational expenses, and will not reimburse, any costs for tools, software, or supplies *which may be retained by the employee* after the course. Meals, lodging, and transportation are also not included and will not be reimbursed.

Itemized receipts: In order to receive reimbursement, receipts and tuition statements must be itemized so as to show individual costs and fees, and must indicate the method by which payment was made. If the employee does not receive an itemized receipt at the time of purchase, he/she must request a handwritten receipt on the bookstore letterhead. Handwritten textbook receipts from an individual that are not purchased through the internet are not accepted.

Procedures

Step1: APPLICATION; Employee submits SelectQuote Cares - Tuition Reimbursement Application to Tuition Reimbursement Program (2+ weeks before course) ([Tuition Reimbursement Application Form](#))

- A. Manager's approval, based on:
 - a. Tenure,
 - b. No current corrective action, and
 - c. Related coursework.
- B. SelectQuote Administrator approves/denies approval form based on employee meeting eligibility requirements. Requests additional information, if needed.
- C. Director approval
- D. Employee and related SelectQuote parties (HR, Accounting, Payroll) are provided notification of approval/denial, in writing.

Step 2: COURSEWORK; If application is approved, employee completes coursework

Step 3: REIMBURSEMENT REQUEST; Upon completion of coursework, Employee submits SelectQuote Cares - Tuition Reimbursement Request ([Tuition Reimbursement Request](#)) **Employee MUST submit all required** documents within 90 days from the course completion date. There will be no exceptions to this policy.

Required documents:

- 1. [Official grade verification](#)
- 2. Copies of itemized receipts for [covered expenses](#)

Step 4: CLAIM PROCESSING; SelectQuote processes Reimbursement Request and requests any additional info needed from the employee in order to approve. Once all documentation to support the claim has been submitted, the SelectQuote Administrator will respond in writing approving or denying the reimbursement within 10 business days.

Step 5: PAYMENT PROCESSING; SelectQuote processes payment, if any.

- a. Payroll will process reimbursement requests no later than the pay period which occurs 30 days from which the approval was granted.
 - i. Payment will be made during regular pay cycles only. No off-cycles will be run for tuition reimbursements.
- b. Payment will be made in the same manner as regular paycheck payments.

Tax Liability:

Employer-provided educational assistance is not taxable to employees. It is not included on the employee's W-2, nor is it reported on the employee's tax return.

See [Pub 970](#), Employer Provided Educational Assistance.

Reimbursement Payment:

Upon full receipt of the grades and covered expenses, the SelectQuote Cares Administrator will approve or deny.

If approved, the reimbursement request will be forwarded to HR, Accounting and Payroll to be paid out to the employee within 30 days of approval.

Termination of Employment / Repayment of Reimbursement:

Employees who do not remain employed with SelectQuote for 12 months from reimbursement payment may be required to repay any educational assistance received during the previous 12 months. This applies to all voluntary terminations as well as terminations based on terminations for cause.

No Guarantee of Employment or Promotion:

While successful completion of a course of study will improve an employee's educational background, the fact that SelectQuote may provide educational assistance benefits for a course of study under this Program does not create any guarantee, contract, or promise of any kind that the employee will be rewarded for successful completion of the course of study through job promotion, transfer, reassignment, bonus, or wage/salary increase. Nothing in this Program shall be deemed to constitute a contract or promise of any kind between SelectQuote and any employee, or to be a consideration or inducement for the employment of any employee. Nothing contained in this Program shall be deemed in any way to alter any employee's status as an at-will employee, to give any employee the right to be retained in the service of

SelectQuote, or to interfere with the right of SelectQuote to discharge such employee at any time and for any reason or no reason, consistent with applicable laws.

Appeal Process:

If you are denied reimbursement and you feel you have provided proper documentation, you can submit an appeal for reimbursement:

- Employee must send appeal email within 30 days of reimbursement denial to the Human Resources inbox (humanresources@selectquote.com)
- HR will conduct the review of the appeal separately
- Employee will be notified, in writing, by HR within 10 days