



HEALTHY LIFESTYLE REIMBURSEMENT PROGRAM

The mission of our healthy lifestyle reimbursement program is to encourage healthy lifestyles and provide opportunities for employees to pursue physical well-being.

What are the key benefits?

- Reimbursement of up to 100% of your costs to a maximum of \$420 per calendar year. Programs eligible for reimbursement include:
 - Weight Watchers or similar weight management program
 - Gym or fitness membership
 - Home gym equipment
 - Fitness classes (ex: Pilates, Yoga, Zumba, etc.)
 - \$100 towards fitness tracking devices (not in addition to the \$420 reimbursement)
 - Fitness subscription services (ex: Peloton, ClassPass, etc.)
 - Tobacco cessation programs
 - Parents and Caregivers of children will have the opportunity to use \$50 of their 2021 Healthy Lifestyle Reimbursement towards programs geared to navigating the virtual learning environment. The \$50 can be used for virtual learning programs such as receiving a consultation or tactical guidance from a learning professional

What are the requirements to participate?

- All full-time and part-time employees are eligible to participate in this program. You must be a current employee for a minimum of 3 months prior to the submission of your reimbursement request.

How do I get my bill reimbursed?

- Submit the Healthy Lifestyle Reimbursement receipts to Benefits@captrust.com. Your reimbursement will be included in the next administratively feasible payroll.
- Reimbursements will be processed once per calendar year per employee. Only submit documentation once the full reimbursement amount has been spent or at the end of the year.
- Healthy Lifestyle Reimbursement receipts are due by December 20th.

Is the benefit taxable?

- Yes. The benefit is considered taxable income to the employee only in the year in which it was received. The benefit amount is included in your W-2 wages.

Is there anything not included in the lifestyle reimbursement?

- This is only available to employees of CAPTRUST. If you purchased a family membership, please submit the cost of an individual membership for reimbursement.
- Golf lessons, tennis lessons, country club memberships, neighborhood swim club memberships, sports leagues, meal replacement programs, and supplements are currently excluded.

Please contact Human Resources with any questions.