



CAPTRUST | Financial Advisors
A Business of CapFinancial Partners, LLC

BUSINESS TRAVEL & EXPENSE REIMBURSEMENT POLICY

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Travel Policy Purpose and Scope

Purpose

The goal of CapFinancial Partners, LLC Travel and Expense policy is to appropriately accommodate traveler comfort, convenience, safety, and the significant cost of business travel in a fair and consistent manner, and to reimburse employees for certain expenses incurred in the performance of authorized company business, in a timely fashion. It is our policy at CapFinancial Partners, LLC to reimburse each employee for business related expenses, subject to certain thresholds and approvals.

Scope

This policy includes general guidelines for such routine Company business expenses, including travel, of which all employees are required to adhere. Such guidelines and policies for reimbursement may be updated or changed at the sole discretion of Management. Financial Advisors are reimbursed under a separate reimbursement agreement (“FA SOD Policy”) but are subject to the overall policy and guidelines included herein.

Exceptions to Policy

Exceptions, deviations, or reimbursements for expenses that are not in compliance with this policy require the explicit prior written approval of Executive Management.

Business Expenses

CAPTRUST will reimburse employees for usual and customary business expenses incurred to conduct approved business. All employees are required to use sound judgment to efficiently conduct business, while incurring expenses proportionate to the usual cost of conducting business.

CAPTRUST will not reimburse any expense deemed excessive, inappropriate, or that is not in compliance with this policy. Expenses will be reimbursed in accordance with CAPTRUST’s applicable policies and procedures, including expenditure limits and substantiation requirements. All employees must complete their expense report in Concur in order to receive reimbursement. Information regarding the expense reporting and reimbursement process is discussed in the [‘Expense Reporting & Reimbursement’](#) section of this policy.

Employment candidate travel will be booked by Human Resources and is subject to the same guidelines of this policy.

Credit Card Usage

CAPTRUST will provide employees with an American Express Corporate Card if it is deemed necessary by the employee’s manager. To initiate a request for a corporate card, an employee must complete the CAPTRUST Corporate Card Request form found in [Appendix A](#). The manager’s signature is required on the request form. The Corporate Card Request form will not be accepted if the manager’s signature is missing.

Use of the Company’s corporate credit card for personal expenses is prohibited. Personal charges incurred on a corporate card will result in a payroll deduction to repay CAPTRUST the amount of the personal charges. Repeated use of the corporate card for personal charges may result in suspension or cancellation of the employee’s corporate card.

Monthly expense reports are REQUIRED to be submitted with the use of a corporate credit card (see [‘Expense Reporting & Reimbursement’](#) for details). Repeated failure to submit expense reports and the required backup may result in suspension or cancellation of the employee’s corporate card and payroll deduction to repay CAPTRUST for all charges deemed personal by Finance and the employee’s manager.

Definitions

The following list of terms is used throughout this document and are defined as follows:

‘CAPTRUST’ refers to CapFinancial Partners, LLC.

‘The Company’ or ‘Company’ refers to CapFinancial Partners, LLC.

‘FA’ refers to Financial Advisors.

‘General Employee’ refers to non-Financial Advisor employees.

‘All Employees or Each Employee or The Employee’ refers to all employees including both Financial Advisors and General Employees.

‘Finance’ refers to the Finance Department at CapFinancial Partners, LLC.

‘Agency’ refers to World Travel Service.

‘Concur’ refers to the use of the Concur Online Booking Tool or Expense Reimbursement Tool.

‘Corporate Card’ refers to the CAPTRUST issued American Express Corporate Card.

‘Executive Management’ refers to managers reporting directly to the CEO, CFO, COO, etc.

‘Expense’ refers to all business expenses incurred in the normal course of company business.

‘Non-reimbursable Expense’ are expenses not authorized for reimbursement as outlined in this policy.

‘Personal Card’ refers to an FA or General Employee’s personal credit card.

‘Reimbursable Expenses’ are expenses authorized for reimbursement in accordance with this policy.

‘Major City’ refers to areas deemed as high cost areas by CAPTRUST and are subject to a nightly rate of \$300 or less.

‘Non-Major City’ refers to all other areas that are not listed as high cost areas by CAPTRUST and are subject to a nightly rate of \$200 or less.

‘Out of Pocket’ expenses refer to expenses paid by an employee, using their own cash or personal credit card for business-related and reimbursable expenses.

Travel Arrangements

Reservation Procedures

CAPTRUST uses the Concur online booking tool as the *preferred* method for booking travel and for expense reporting purposes. All employees are responsible for booking their own travel and must use the Concur online booking tool to book travel. The Concur website is www.concursolutions.com.

CAPTRUST also has a travel agent team provided by World Travel. The agent team is ready to assist a traveler when they are unable to book a trip in Concur or, for complex Domestic and International travel. The travel agent team should only be contacted if an employee is unable to book travel using the Concur online booking tool.

The World Travel Agent Team can be contacted at 800-251-9047 (Toll Free within the United States) or 865-777-1600 (if calling outside the United States).

Emergency Travel Assistance

When traveling, employees may contact (800) 251-9047 for Domestic calls and (865) 777-1600 for International calls. In the event of a life-threatening emergency, employees should first contact local emergency authorities to receive immediate assistance.

For travel and accommodation arrangements during a crisis, travelers should contact World Travel at (800) 251-9047.

CAPTRUST Travel Contact

For travel and expense policy questions, employees should contact Aaron Caudill Aaron.Caudill@captrust.com or (919) 870-6822 x 10485 during the hours of **9am to 5pm Eastern Standard Time**.

Traveler Profiles

All employees are required to complete a Traveler Profile in Concur prior to using the system. The Traveler Profile is used as a communication tool between the traveler, Concur, and CAPTRUST Finance to aid in the reservation process.

Each employee may enter their passport, Visa, Trusted Traveler, and travel rewards programs in Concur to take advantage of expedited security and loyalty programs when booking travel.

Air Travel

All air travel reservations must be authorized in advance by an employee's immediate supervisor and must be booked through Concur. Employees must book coach class fare when booking air travel. Manager approval is required for all non-coach class fares. Upgrades from coach are only allowed without manager approval if there is no cost associated with the upgrade. If charges are incurred for upgrades that are not preapproved, the employee must personally pay the charge. If a charge associated with an unapproved upgrade is incurred using the employee's corporate card, the employee will receive a payroll deduction to cover the cost of the upgrade.

Airline Frequent Flyer Programs

Potential earning of frequent flyer mileage should not influence the employee's choice of airline under any circumstance. Frequent flyer miles or rewards earned as a result of reasonably booking air travel for

business use, may be kept for personal use. CAPTRUST will not reimburse for the cost of airline frequent flyer programs.

Airline Club Memberships

Fees and dues associated with airline club memberships (i.e., AA Admirals Club, Delta Sky Club, etc.) are not allowable expenses and are not eligible for reimbursement.

Standby Travel

Paying a fee to fly standby is discouraged unless done for sound business reasons.

Unused Airline Tickets

Failure to travel as originally planned and ticketed may result in expensive re-booking charges or entire forfeiture of the ticket value. All employees are encouraged to plan travel carefully and to keep original ticketed travel plans to avoid such losses.

Unused, non-refundable tickets will be held on file in Concur by World Travel. Unused tickets that can be reused will be applied against the employee's next flight with the airline at the discretion of World Travel. A rebooking fee is applied against unused flights that are reused. The flight to be reused must exceed the rebooking fee in order to be reused.

Note: Non-refundable tickets can only be applied to the same traveler who was originally issued the ticket. Most airlines require rebooking at the time the original trip is cancelled and charge a fee for doing so.

Lodging

Hotel Reservations

The Concur online booking tool is the required method for making hotel reservations. The hotel listings within Concur are negotiated to provide preferred rates to CAPTRUST travelers.

Receipt Requirements

All charges must be supported by an itemized hotel receipt. Summary receipts are not an acceptable form of documentation. Missing receipt forms are not accepted for hotel charges because a copy of the receipt can easily be obtained by contacting the merchant.

Rates, Reservations and Room Guarantees

All employees must use standard single room rate accommodations. Upgrades will not be reimbursed, including concierge floor rooms and executive suites.

Some hotel properties have restrictions on reservations and room guarantees. Employees are encouraged to read and understand all restrictions prior to completing the hotel reservation.

Acceptable lodging rates are based on locality as defined as either a 'major city' or 'non-major city'. Major City refers to areas deemed as high cost areas by CAPTRUST and are subject to a nightly rate of \$300 or less. Non-Major City refers to all other areas that are not listed as a high cost area by CAPTRUST and are subject to a nightly rate of \$200 or less. Below is a list of major cities which are subject to a nightly rate maximum of \$300. Any location that is not listed below is subject to \$200 nightly rate maximum.

Major Cities (High Cost Areas):

Atlanta, GA	Honolulu, HI	Oakland, CA
Austin, TX	Houston, TX	Philadelphia, PA
Baltimore, MD	Los Angeles, CA	San Francisco, CA
Boston, MA	Miami, FL	San Jose, CA
Chicago, IL	Minneapolis, MN	Santa Barbara, CA
Dallas, TX	Nashville, TN	Seattle, WA
Hartford, CT	New York City, NY	Washington, D.C.

Hotel Booking Above Maximum

All employees must have manager approval prior to booking a hotel above the stated maximums. All employees must include a short explanation of why the booking was allowed and is above the stated limits on the hotel charge line item of the export report.

Hotel Cancellation Procedures

All employees must be aware of the cancellation policy for their selected hotel accommodations. The specifics will be detailed on the itinerary and in Concur prior to completion of the hotel reservation.

Failure to cancel a reservation may result in a 'No Show' charge to the employee. This penalty is not reimbursable unless circumstances of non-cancellation are beyond the employee's control.

Hotel Frequent Guest Programs

Potential earning of rewards associated with hotel frequent guest programs should not influence the employee's choice of hotel under any circumstance. Rewards earned as a result of reasonably booking hotel stays for business use, may be kept for personal use. CAPTRUST will not reimburse for the cost of hotel frequent guest programs.

Car Rental

Making a Car Rental Reservation

Concur is the preferred method to make car rental reservations. Rental cars may be used only when other means of ground transportation are costlier, or if a significant amount of local travel is required at the employee's destination. General employees are required to rent a car when driving more than 300 miles, roundtrip, for business purposes. General employees must rent through the company's preferred vendors, Enterprise Rent-A-Car and National Car Rental, whenever possible.

General employees traveling to the same location should share ground transportation to and from the destinations, whenever possible.

Receipt Requirements

All charges must be supported by a detailed, itemized receipt issued by the car rental agency.

Car Rental Size Guidelines

Standard/Intermediate is the company preferred car size. Rental of full-size vehicles should be reserved for situations of three or more occupants or when transporting bulky equipment.

Car Rental Accessories

CAPTRUST will not reimburse employees for additional 'add-on' type charges such as Personal Effect Protection, GPS, On-Star Service, Satellite Radio, Avis Tag, etc.

Car Rental Insurance

CAPTRUST's preferred vendors, Enterprise and National, have a copy of CAPTRUST's auto insurance policy on file.

Inside the United States

Employees should always decline the Collision Damage Waiver and the Additional Liability Insurance when traveling in the United States.

Outside the United States

When traveling outside the United States, employees should accept Rental Car Collision Damage Waiver as most insurance companies will not cover international accidents.

Car Rental Accidents

In the event of an automobile accident during business activity, regardless of fault or severity, the employee must immediately report the accident to the proper authorities and their manager. Claims must be emailed to the Finance Department. Availability of insurance coverage for business use of a personal or rental car will be evaluated based upon the specific circumstances of the accident.

Finance Department Contacts for Auto Accidents:

Mary Earls Mary.Earls@captrust.com

Christopher Best Christopher.Best@captrust.com

Traffic and Parking Violations

Fines for traffic and parking violations are not covered by CAPTRUST and are not reimbursable.

Car Rental Club Memberships

Potential earning of rewards associated with car rental club programs should not influence the employee's choice of agency under any circumstance. However, rewards earned during business travel may be kept for personal use. CAPTRUST will not reimburse for the cost of car rental club memberships. CAPTRUST does, however, offer free Emerald Club access to all employees.

Emerald Club

The frequent rental program for National/Enterprise is Emerald Club, which offers multiple benefits to travelers. These benefits include the option to bypass the counter and choose your own car from the designated Emerald Club Aisle. In addition, returns are expedited with E-receipts. While using Emerald Club you will accumulate free rental days, which may be redeemed for personal travel. Refer to [Appendix C](#) for Emerald Club enrollment information.

Other Transportation

Personal Car Usage Guidelines

Employees may use a privately-owned vehicle for business travel with approval by his/her manager. Only mileage is reimbursable. Gasoline, auto repair, and towing of a privately-owned vehicle are not reimbursable.

Reimbursement

Mileage reimbursement is calculated at the published IRS rate per mile, or lesser amount if locally defined. To calculate reimbursable miles, track and record total miles for the trip in Concur. Commuting expenses will not be reimbursed for those employees that CAPTRUST provides a regular place of work. Commuting mileage is mileage from the employee's home to his/her branch office location. Therefore, if an employee leaves directly from his/her home to travel to a client (even if it is closer and more efficient than traveling from the office) the mileage equal to the distance between home and office cannot be claimed nor can the mileage be claimed, equaling the distance between home and office, going back home from the client site.

For example, if the distance between the employee's home and the office is 20 miles, and the distance between the employee's home and the client meeting is 30 miles, then the 20-mile commute is disallowed, and the employee can only claim 10 miles for reimbursement. Likewise, when the employee is driving back home from the client visit, the 20-mile distance (representing office to home distance) cannot be claimed. These commuting rules do not apply for those employees who do not have an official office location, but rather work from their home (where the home is considered the primary office location).

Personal Automobile Insurance

Employees must be at least 21 years old and have a valid driver's license to use a personal vehicle for Company business purposes. Minimum insurance requirements, as specified by CAPTRUST's insurance carrier, must be in effect at the time the employee's personal vehicle is used. Employees may be required to provide the appropriate proof of insurance. Employees using personal automobiles on Company business are required to carry the liability and auto/no-fault insurance limits required by the state in which the car is registered.

Taxi/Bus/Car Services

Taxis or car services should be used only when valid business reasons preclude the use of more economical modes of transportation or for short-term trips at foreign locations where limited ground transportation is anticipated to be only required for the trip to and from the airport and hotel. General Employees should seek approval from their manager prior to booking car services that are not considered taxi services.

Rideshare Services

Rideshare services such as Lyft and Uber are acceptable alternative modes of transportation and are reimbursable expenses when used during business travel.

Meals & Entertainment

Individual Meal Expenses

CAPTRUST will reimburse employees for reasonable, travel-related, meals incurred in connection with business travel. General employees are expected to incur no more than approximately:

\$15 for breakfast, \$20 for lunch, and \$35 for dinner (excluding tip) per day.

The cost of an individual meal before departing for a business trip or returning from a business trip is not reimbursable. Meal expenses for general employees that exceed the amounts outlined above will require explanation, justifying the expense. Otherwise the amounts over the limits outlined above will be considered a personal expense.

Group Meal Expenses

When more than one employee is present at a function where expenses will be submitted for reimbursement, the most senior level employee should pay and expense the bill.

Group business meals or entertainment expenses must be submitted with an itemized receipt, business purpose for the meeting or entertainment, and a list of attendees.

Tipping & Gratuities

Tips and gratuities for meals should be reasonable in nature. Employees may be asked to explain excessive tipping in order to be reimbursed.

Non-Reimbursable Expenses

The following list of expenses are not allowed and are therefore not reimbursable as business expenses as defined in this policy:

- Airline upgrades (i.e., Fare Class Upgrades, Preferred Seating).
- Personal entertainment: reading materials, movies (including in-room movies), theater tickets, etc.
- Personal toiletries.
- Personal grooming (barber, salon, shoeshine, etc.).
- Dry-Cleaning and laundry services (unless service is approved by employee's Manager when longer trips are incurred).
- Hotel mini-bar usage or tobacco products.
- Membership dues for hotel clubs, airline clubs, car rental clubs, etc.
- Personal credit card/corporate card charges and fees.
- Babysitting fees or Kennel fees.
- Parking ticket or traffic violations.
- Personal amusement, such as sporting events, concerts, etc. while traveling (unless otherwise approved by a Manager).
- Travel Insurance.
- Any costs of maintaining service to the employee's home or apartment while on travel status.

Expense Reporting & Reimbursement

Automated Expense Management System (Concur)

Requests for Travel & Entertainment expense reimbursement must be submitted through Concur. The Concur system automates the preparation, completion, submission, approval, and payment of expense reports.

One expense report should be submitted monthly for all expenses incurred within the month. The monthly expense report should be submitted on or before the 10th of the month following the month of the charges.

If an employee fails, multiple times, to submit an expense report before the deadline stated above, CAPTRUST may revoke the employee's use of the company credit card, if applicable, and may treat all unsubmitted expenses as personal expenses and payroll deductions.

Expense Segregation and Itemization

Each expense must be entered as a separate line item on the expense report and individually assigned to the appropriate expense type. Combining the same expense over several days or weeks is prohibited. Expenses requiring itemization, such as hotel expenses, must be completed prior to expense report submission.

Documentation Requirements

The IRS requires business expenses to be substantiated by documentary evidence. All receipts in conjunction with the expense report must include the amount, date, place, and business purpose of the expenditure. Receipts that lack complete documentation may be rejected and sent back to the employee to correct. Please note that receipts are **REQUIRED** to be turned in for both corporate card and "out of pocket" expenses that are \$75 or more. Expense reports without the proper receipts and documentation will be rejected and sent back to the employee to correct.

Travelers must provide the appropriate documentation as follows:

- Hotel folios (itemized bill) for all hotel stays.
- Itemized bill for all meals.
- Attendees and business purpose for group meals/entertainment.
- Evidence of any requisite pre-approvals must be attached to the expense report.
- The only acceptable travel itineraries are the .PDF file image sent by World Travel to the traveler, or the itinerary from Concur.
- Electronic receipts are acceptable in lieu of original receipts provided that the detail on the receipt includes the amount of the charge, transaction date, and form of payment.

Reimbursement

Reimbursements are processed weekly and any amount owed to the employee for "Out of Pocket" expenses will be reimbursed on Friday, via direct deposit, or check, if direct deposit is not applicable.

Expense Report Audits

Managers must review their direct reports' expenses prior to approving the expenses for payment.

Every expense report is subject to audit, by Finance, after receiving manager approval.

Any expense deemed out of compliance with this policy will be sent back to the employee for correction and will require resubmission through the approval process.

Concur Expense Guides and Assistance

For Concur Expense basic "how to" questions, employees should reference the Concur Training site located at <https://www.concurtraining.com/en-us/pr/get-started>. The site contains Concur guides, tip sheets, and 'how to' videos. If you still have questions about Concur Expense after visiting the site above, please contact Aaron Caudill Aaron.Caudill@captrust.com for additional assistance.

Continuing Education/Conferences

Continuing Education

Continuing education for regulatory requirements and associated travel are considered reimbursable expenses. Continuing education for professional designations such as CFA, CIMA, and CFP may be paid at the Company's discretion and with Director of Human Resources approval.

Professional Conferences or Seminars

Employees are encouraged to attend professional conferences or seminars that are related to the work they are doing at CAPTRUST. Employees may submit requests to their Managers or Managers may request that an employee attend a specific conference or seminar.

Requests to attend a conference or seminar must be submitted, in writing, to the employee's Manager. The manager must then provide acceptance or denial of the conference or seminar to the employee, in writing. No employee may attend a conference or seminar without the prior written approval of their manager.

When an employee attends a conference, the employee shall submit a written summary of the key information obtained (so that it may be easily shared) to his/her Manager prior to being reimbursed for the related expenses.

Cell Phones and Data Plans

CAPTRUST will pay for or reimburse employees for actual expenses for cell phones and data plans, subject to certain limits. Employee's Manager must give his/her approval for an employee to have a Company provided cell phone. ***Please refer to [Appendix B](#) for the details on costs to be paid or reimbursed and other specifics.***

All Company issued cell phones and data on all cell phones used for Company business are the property of the Company. Please refer to the Employee Handbook, section "Use of Communication Devices," for other guidelines and restrictions on cell phone usage.

Violations

A clear, well-documented and organized business expense policy is of vital importance to CAPTRUST. Each employee is required to familiarize himself/herself with all aspects of the current business expense policy. Any questions can be directed to the Finance Department.

Finance Department Contact for Policy Questions:

Mary Earls Mary.Earls@captrust.com

Christopher Best Christopher.Best@captrust.com

Violations and any form of abuse in relation to these policies and standards will result in disciplinary action, up to and including termination of employment.

Appendix A



CAPTRUST AMEX CORPORATE CARD REQUEST FORM

All fields below are required fields and must be completed. Please ensure that you read and understand page 2 of this form. Email your completed application to Aaron.Caudill@captrust.com.

☐ Green Card

☐ Platinum Card

Name on Card

Legal Name

Business Phone Number

By completing this form, I acknowledge that I understand I am required to submit one expense report each month, through Concur Expense, for the charges incurred on my corporate card.

Applicant Signature

Manager Printed Name

Manager Signature

CORPORATE CARD PROGRAM CHARGES

Manager approval is required for an employee to be issued a Company credit card.

General Credit Card Fees

- Corporate Green Card - \$15 annual fee
- Corporate Platinum Card - \$550 annual fee
 - Member Rewards Membership included in fee
- Member Rewards Membership - \$90 annual fee
 - All points accrued belong to the cardholder

Allocation of Costs between CAPTRUST and Employee

- Member Rewards Membership - \$90: Member Rewards points belongs to the employee to be used as the employee wishes and is NOT reimbursable.
- Corporate Green Card - \$15: CAPTRUST will pay the annual fee.
- Corporate Platinum Card (General Employees) - \$550: CAPTRUST will pay the annual fee less the Member Rewards annual fee of \$90. CAPTRUST will pay \$460 of the annual fee and general employees must pay the remaining \$90 for the Member Rewards Membership that is included.
 - General Employees must obtain Manager approval to be issued a Corporate Platinum Card. This approval is generally based on the expected yearly travel of the employee (average 2 business trips per month).
- Corporate Platinum Card (Financial Advisors)- \$550: CAPTRUST will pay 50% of the annual fee less the Member Rewards annual fee. \$230 of the \$460 will be paid by CAPTRUST. \$230 of the \$460 will be paid by the FA. The remaining \$90 for the Member Rewards Membership that is included is 100% the FA's responsibility.

Appendix B

CELL PHONES AND DATA PLANS

- **Approval:** Manager approval is required for an employee to have a Company provided cell phone.
- **Service Plan Cost:** A maximum amount of \$65 per month can be submitted for cell phone service plan costs under the employee's individual plan. (Note for FAs: amounts over the maximum submission amount is subject to the FA SOD Policy).
- **Individual vs Company Plan:** CAPTRUST will cover the primary line on an employee's individual (or family) account plan when submitted for reimbursement and the primary line is deemed as the business line (***maximum submission amount is limited to \$65 per month***).
- **Termination Fees:** CAPTRUST does not cover termination fees.
- **Phone Cost:** CAPTRUST will cover an amount up to the cost for the standard cell phone that the Company currently issues/supports (which is approximately \$250). Any costs above this for purchasing a phone will be considered a personal expense and must be covered by the employee. Costs to upgrade a phone will be covered up to the standard cost noted above but only once every 2 years. Upgrade costs that occur prior to every 2-year window is the employee's responsibility and must be paid by the employee.
- **Phone Equipment Costs:** CAPTRUST will cover up to \$35 for equipment costs such as cases for phones, etc., but only once every 2 years. Equipment costs that occur prior to every 2-year window is the employee's responsibility and must be paid by the employee.
- **Wireless Hotspots:** Wireless hotspots are covered 100% by CAPTRUST for general employees but require employee's Manager and IT Department approval. (Note for FAs: Hotspots are subject to the FA SOD Policy).
- **Departure:** All equipment and information on cell phone equipment used for business is the property of the Company. In the event the Company allows employee to take the phone upon departure, the Company will determine, the appropriate charge for the phone, and **CAPTRUST IT Department will wipe the phone of all Company data prior to employee's departure.**
- **Cell Number (belongs to):** It is CAPTRUST's general policy to release an employee's cell phone number to employee upon departure from the Company. CAPTRUST reserves the right, in its sole discretion, not to release an employee's cell phone number, when deemed necessary.
- **Damages:** The decision to repair or replace a company cell phone will be at the discretion of the IT and Finance departments, based on circumstances and damage history.

Appendix C

ENTERPRISE / NATIONAL CAR RENTAL CORPORATE ID

- To receive the CAPTRUST discount, all reservations with Enterprise/National should be sourced to The Company's account number: **XZ53282**. Please note, the CAPTRUST corporate rate can also be used for personal travel by referring to the number above.
- Your Concur Travel Profile should already have the corporate identification number linked to your profile. Car rental should be booked through Concur and our corporate ID will already be applied to your booking. Please verify that the corporate ID is listed on your travel profile before attempting your first booking. If the corporate ID is missing, please contact the Finance Department.

Finance Department Contacts for Concur Travel Profile Assistance:

Aaron Caudill: Aaron.Caudill@captrust.com

Christopher Best: Christopher.Best@captrust.com

INSTRUCTIONS TO ENROLL IN THE EMERALD CLUB

Please closely follow the instructions to ensure that you are enrolled correctly.

Scenario 1: You currently have a preferred renter membership with another car rental company and have earned upgraded status.

- Send an e-mail to Nina.M.Gladysiewski@ehi.com and include your name, mailing address, and status with another vendor. You will be upgraded to that same status within National's Emerald Club.

Scenario 2: You are currently an Emerald Club Member with National Car Rental.

- You do not need to re-enroll. You must send an e-mail to Nina.M.Gladysiewski@ehi.com with your name and current Emerald Club number to have the new CAPTRUST account added to your profile.

Scenario 3: You are not a preferred renter with any car rental company.

Please click the link below to access the online application and complete the enrollment process. Completing the application takes approximately 5 minutes. Your membership will be active immediately upon completion.

Link to Emerald Club: [Emerald Club link](#)