Travel & Expense Policy

This travel and expense policy provides you with a single source that you can reference to clearly understand what expenses are eligible for reimbursement and how the reimbursement process works.

Updated: February 2021

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# Travel and Travel Expenses

## Policy Objectives

* Define reimbursable expenses for business travel and other expenses that employees may incur
* Communicate how employees are to book business trips
* Enhance ZoomInfo’s ability to negotiate discount rates and manage travel expenses
* Satisfy the company’s accounting, tax, auditing, legal, and government compliance requirements
* Monitor travel to different states so we can ensure compliance with state sales tax compliance
* Provide safe and reasonable accommodations for employees that are on the road

## Responsibility

Employees should familiarize themselves with the relevant policies and required approvals before making any purchase in the course of ZoomInfo business, as unauthorized expenses may not be reimbursed. Inherent in the general policy are the following requirements:

* Employees are expected to be reasonable in their spending
* Employees may not approve their own expenditures
* Employees may not use an expense reimbursement to enhance their standard of living
* The expense report must include full and accurate descriptions for all expenses Receipts must be submitted with expense report
* Approvers must ensure that expenditures are in compliance with this policy

Employees are expected to exercise good judgment in their business dealings and to reflect good character, high ethical standards and conduct, and a desire for the best quality in their representation of the company. An employee or approver that falsifies or does not comply with this policy may be held financially accountable and subject to not receiving reimbursement for the expense, disciplinary action, or termination.

## Timing of Travel

Travel should be planned in advance to allow for the most expedient and economic routing and to improve your choice of flights and seats. TripActions is configured to allow trips to be booked up to 60 days in advance. Flights booked 7 days or less in advance are considered out-of-policy and you will be required to give a reason for the out-of-policy trip before you can proceed with the booking. This information will be sent to your manager for approval. The costs of travel-related expenses are reimbursable from the time you leave your home or office at the point of departure until you return home or to the office as the point of travel termination. The time of absence from home for business travel will determine the level of some reimbursable travel expenses. Travelers are expected to maximize their business day. All attempts should be made to obtain a flight with the least amount of travel time during normal business hours while being cost efficient.

## Authorized Travel Agent

ZoomInfo uses TripActions as our exclusive travel agency to provide benefits to both our employees and the company. These benefits include:

* Offering a one-stop location for employees to book their travel
* Allowing employees to directly bill their airline flight to the company
* Having built-in policy information, this ensures your travel is in policy and you will be reimbursed
* Providing assistance for travelers that need to rebook flights
* Tracking our travel so we can ensure compliance with state sales tax laws
* Tracking our travel purchases so we can negotiate better services and amenities and lower costs
* Allowing us to locate and support our employees in the event of an emergency

Because of these benefits, except as noted below

* ZoomInfo only allows airline flights, cars, and train trips to be reimbursed when booked through TripActions. The company must comply with sales tax requirements in each state, and in order to achieve this, we must know every state and location employees travel to. The company is required to collect and remit sales tax from our customers in states where we have nexus. The company pays this tax and it can be a substantial cost.
* If you need to book travel outside of TripActions for, you must contact your manager for advance approval. This can result in substantial tax issues that would ultimately cost both ZoomInfo and our customers’ significant money.

## Trip Approval

All employees are required to book through TripActions.

0nce booked, TripActions will send an email to your department’s authorized approver. It is your manager’s responsibility to ensure compliance and they will have 2 days to terminate the booking if out of compliance.

ALL employees must receive authorized approval to attend any industry trade show or user conference before you book a trip to the event. Your department’s CXO will create a list of approved attendees and send it to marketing.

## Airfare and Reservations

### Flight Scheduling

Employees should select the lowest reasonable fare that accommodates the approved travel times, regardless of individual carrier preferences. TripActions has been configured to search for the lowest reasonable fare that departs within 2 hours of the requested departure time and arrives no later than 2 hours after the best routing option. Flights will be flagged for being out of policy that cost more than 20% over the lowest reasonable option and are within these time parameters are out of policy.

VP’s and higher are allowed to book in Business Class when flight is longer than 4 hours.

ZoomInfo restricts the number of employees at the VP level or higher on the same flight to 4.

If you want to make a flight change (e.g. take an earlier flight, it must be at least a 4 hour time difference from the flight you are changing). No reimbursement will be made for cost differential if the flight times are less than 4 hours.

In the event that you need to book a flight that is out of policy, you will be required to choose a reason code and your department’s approver will see this information and decide whether or not to approve it. If the approver determines that the lower cost alternative flight is acceptable, then you’ll need to rebook your ticket.

### Payment

Travel expenses booked through TripActions should be paid for using the company credit card and NOT submitted for reimbursement.

### Baggage, Class of Service, and In-flight Costs

The cost of checking a single bag may be submitted for reimbursement if paid on an employee's personal credit card. The cost for additional checked bags (such as marketing materials) should be approved in advance by your supervisor. In-flight internet is reimbursable.

Employees are required to travel on the most reasonably priced flights, most often this will be economy for all domestic company travel. Economy Plus may be booked for international flights for employees at the level of Director and Senior Director. Business class may be booked for international flights for employees at the level of Vice President and above. International flights are those that exceed 8 hours in length, excluding layover time. Seat upgrades, reassignments, and in-flight entertainment will not be reimbursed.

### TSA Precheck

In order to make your travel experience better, frequent travelers can apply for TSA precheck at https://www.tsa.gov/precheck and expense the application fee.

Note: this must be approved by your department CXO in advance.

### Unused Airline Tickets

TripActions will track all unused non-refundable tickets, and this information (airline, amount, expiration date, etc.) will be reflected on your TripActions home page. Unused tickets typically expire within a year, and you should redeem these as soon as possible. TripActions will prompt you to redeem unused tickets at the time of purchase.

### Frequent Flyer Programs

Travelers are eligible for mileage awards under airline frequent flyer programs. Specifying particular airlines or booking out-of-policy flights in order to participate in the awards program is prohibited.

### Delays, Layovers, and Cancellations

While traveling, there may be unscheduled delays due to weather conditions, mechanical difficulties or flight cancellations. Employees should make every attempt to have the airline accommodate their travel schedule on the next available flight. In many cases, stranded travelers will be accepted by another airline when the carrier they are flying cannot provide the necessary service. In cases of lengthy delays where no other flights are available, the airline may offer vouchers to cover expenses, such as meals, overnight accommodations and taxi fares. To the extent that these benefits are provided by the airline, employees should not include these items on their expense report for reimbursement.

Finally, to expedite the rebooking of your travel plans, you can either work directly with the airline or you can contact a TripActions agent.

### Denied Boarding

**Voluntary Denied Boarding**

Airlines occasionally offer free tickets or cash allowances to compensate travelers for delays and other inconveniences due to overbooking, flight cancellations, etc. Employees may volunteer for denied boarding compensation only if the delay in the trip will not result in any interruptions or loss of ZoomInfo business. The company does not reimburse employees for lodging and other expenses as a result of a voluntary denied boarding.

**Involuntary Denied Boarding**

Employees who are involuntarily denied boarding should arrange alternative flights from the airline or contact a TripActions agent.

## Ground Transportation

### Airport Parking

Airport parking should be at an economy lot or off-airport location that minimizes total parking costs unless time is very tight for your trip.

Additionally, for employees that live more than 20 miles away from the airport, using Park & Ride lots, airport shuttles, and Uber/Lyft should be considered.

Regardless of which airport employees are flying from, employees are encouraged to take Uber/Lyft to/from the airport if the roundtrip cost will be less than the cost of parking.

### Car Rentals

The use of car rentals is permitted for out of town business travel when public or courtesy transportation is either unavailable, impractical or not cost efficient. All rental car reservations must be arranged through TripActions.

Employees may rent up to a midsize car. Upgrade fees to premium, luxury or exotic cars are not reimbursable.

When traveling in groups, cars should be shared. If three or more employees are traveling as a group, then a midsize, standard or full-size car, van or SUV is allowed. You will need to select the reason code when booking this car and you will also need to include the list of passengers on your expense report.

Rental car reimbursements are not allowed for work or assignments in the employee’s home metropolitan area, upgrades fees, or renting a premium, luxury or exotic car.

### Refueling

Fuel expenses paid by the employees are reimbursable. To avoid costly surcharges for refueling rental cars, employees must refuel the rental car before returning it to the rental car agency.

### Insurance

**You do NOT need to purchase any insurance coverage in the U.S. and Canada.** If you are renting a car in another country, you need to purchase insurance. If an employee uses a rental car for a combined business and personal trip, ZoomInfo’s insurance will not cover any accidents or other claims for events that occur during the personal portion of the trip.

### Uber, Lyft, and Taxis

Taxis and Uber/Lyft are allowed where use is more practical and cost efficient than renting a car. If you have time, please use the ride sharing option to reduce costs. Tips for ride-sharing services may be reimbursed up to 20% of the total bill, whichever is greater, and should be noted on the receipt.

In order to be reimbursed, you should submit a receipt along with the trip date and itinerary. Employees are encouraged to use a taxi to and from the airport when the total cost will be the same or less than the cost of parking at the airport and mileage reimbursement.

Taxi reimbursement is not provided for travel in an employee’s home Metro Area unless it is to the airport for a trip.

### Trains, Rail Service, Subways and Other Public Transportation

Employees will be reimbursed for train travel if the combined cost is no more than the lowest reasonable airfare to the same destination. Employees will be reimbursed for subway, bus or other public transportation costs that you incur.

### Personal Use of Automobiles

Except as noted below, ZoomInfo reimburses mileage allowances to employees who use their personal automobile for business travel. Mileage submitted for reimbursement must be substantiated by providing the destination, the number of miles driven, and the business purpose for each trip.

Reimbursement for the use of personal automobile in lieu of flying to another city is permitted only if the combined cost of mileage, tolls and parking do not exceed the cost of the lowest airfare to the same destination plus ground transportation, mileage and parking both to the airport and at the destination OR the cost to rent a car, whichever is lower.

Mileage reimbursement is not allowed for commuting to and from a ZoomInfo office and an employee’s home. In addition, remote employees will not be reimbursed for mileage in their home Metro Area.

### Tolls and Parking

Tolls and parking expenses while traveling for business are reimbursable and employees must retain and submit receipts. Receipts are not required for tolls and parking under $20.

Electronic toll passes are an excellent addition when renting a car. This saves you time and you don’t have to worry about carrying cash or exact change to pay tolls. The actual tolls will be added to your final rental car bill along with a small convenience and processing fee for each day that you use the toll pass, making it easy for you to track the costs and submit it for reimbursement.

## Lodging

All lodging accommodations must be made through TripActions. The only exception to this rule is if you’re able to find a lower price than comparable hotels on TripActions, or using a negotiated rate for a conference you’re attending.

TripActions is configured within policy rates for cities that we frequently travel to, so you’ll know if the hotel you’re choosing is in policy. Only actual costs for lodging that are reasonable and necessary while on company business are reimbursable. If you select a smaller city that does not have in-policy rates in TripActions, the approved hotel rate is up to $150 for up to a 3.5 star hotel.

Reimbursement for lodging is limited to the single standard room rate. ZoomInfo will not reimburse employees for suites or other premium rooms without the advance approval of their CXO. To help lower costs, if you stay with family or friends while you travel, the company will reimburse you $50 for each night that you do not incur hotel costs. Additionally, employees may be reimbursed for laundry costs on a trip lasting more than 7 days, and are encouraged to use off-site laundry facilities to reduce costs.

**Note:** laundry costs will not be reimbursed if you are staying at a corporate apartment as they have laundry facilities.

### Vancouver

ZoomInfo has 3 apartment units located at: 601 Columbia Street, Vancouver, WA 98660.

When traveling to Vancouver you should first book the apartment if it’s available, you can do this by reaching out to Sierra Sherrell (sierra.sherrell@zoominfo.com).

Should the apartment not be available during your stay, ZoomInfo’s other lodging accommodations are the Comfort Inn (first choice) and Hilton (second choice), both located downtown and walkable to the office.

### Bethesda

For trips to Bethesda we’ve negotiated a discounted rate with the Hilton Garden Inn, which is close to the office. These discount rates are loaded in TripActions. We also encourage employees to look at the Hyatt near the office as well, as sometimes rates there are cheaper than the Hilton Garden Inn.

### Other Cities

Hotel rates differ in each city. The company has set up different in-policy limits in TripActions for the cities that we travel to the most. The TripActions website will show you the in-policy rates for hotels in the city you are traveling to. These in-policy rates are typically targeted to cover hotels with a 3.5 star rating. For cities without a specific rate the in-policy rate is $150 per night before taxes, and you should select a hotel with up to a 3.5 star rating.

### Other Charges

Other personal costs, such as movies or gym fees, are considered a personal expense and are not reimbursable by the company.

### Cancellations

Employees are responsible for complying with hotel cancellation policies to prevent any “no show” charges. Employees will not be reimbursed for “no show” charges incurred due to failure to cancel guaranteed reservations unless the request to cancel was made at the request of the department CXO. Written evidence of the late request must be submitted with the employees expense report.

## Meals & Entertainment

All meal limits described below represent the maximum amount that will be reimbursed by the company. Please consult your manager prior to incurring any meal expense to ensure they will approve it.

### Travel Meals, Drinks, Snacks, and Groceries

Individuals traveling on company business can submit reasonable costs for actual meal expenses while traveling.

For travel days, employees can expense up to the GSA Per Diem Rates found here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>.

Meal expenses should NOT be submitted when your meal is provided or paid for by others - such as food included with a conference, training event or function – or when meals are included in the hotel rate.

Employees on multi-day trips are eligible for reimbursement when you purchase groceries in lieu of meals, subject to the meal limits listed above.

### Overtime Meals

Overtime meals are addressed in the expense policy. Overtime meals are not permitted during business travel.

### Employee Meals

In order to facilitate communications, team building, and effective recruiting, Directors and above can incur meal expenses with existing or potential employees up to the following per person limits for team building activities. This is not to be used as a higher limit when traveling. If two or more employees are dining together for a business meal that the company pays for, the most senior level employee should pay and expense the bill.

|  |  |  |
| --- | --- | --- |
|  | VP and above | Directors |
| Breakfast | $12 | $12 |
| Lunch | $25 | $20 |
| Dinner & Drinks | $50 | $30 |

### Business Entertainment Expenses

Entertainment expenses, such as sporting events and golf outings, with existing or potential customers or vendors are reimbursable if the costs are pre-approved by the department’s CXO. This should be in alignment with our [gifting policy](https://docs.google.com/document/d/1fDpywRTQLw5aX-reTkupG_vJjX1TPVsmr0g2nOf019w/edit). The cost per person should not exceed $100 per person unless the entertainment is part of a company-sponsored event, such as a user conference, or the amount is approved in advance by the department’s CXO.

The most senior level employee should pay and expense the bill.

### Tips/Gratuities

Tips and gratuities are reimbursable up to a maximum 20%.

### Department Outings

To facilitate team building and a great work environment, each department VP may take his/her department on an outing at the company’s expense and should be conducted in accordance with the procurement policies.

## Communications

### Hotel Internet and Phone Costs

Employees may be reimbursed for internet or Wi-Fi access charges if data access is required for company business, such as during a hotel stay or attending an event. All ZoomInfo internet usage policies and restrictions apply to use of internet or data access while traveling. ZoomInfo does not reimburse employees for hotel long-distance phone charges.

IWe encourage employees to use the roaming options with their carrier. Both AT&T and Verizon have "plan extension" programs for $10/day where you can get everything you have on your normal plan (voice, text, data) internationally. This is worth it for people that are travelling for work. Note that if you choose this option, you will only be reimbursed for the expenses incurred for the work portion of your trip, not for any personal days you may have added.

**To minimize international phone charges, we ask that travelers follow the standards below:**

* Employees should use alternate communication channels when practical, including slack or email.
* Whenever possible please either make the call from an office or consider using Zoom. **Note:** you can both make and receive calls using Zoom’s mobile app on your cell phone.
* Alternatively you can purchase a prepaid phone in the airport of the country you’re visiting when you land. A prepaid phone with minutes usually costs less than $50.
* To lower your cell phone costs, please contact your wireless carrier to get an international phone plan before you leave your home country and to cancel it when you return home. You should also avoid taking calls on your phone.
* Change your voicemail message to ask people to call your local country cell phone
* If you answer a call on your cell phone, please call them back on your local country cell phone.

**To minimize international data charges, we ask that travelers follow the standards below:**

* When possible turn off the data roaming feature so that your email messages are not automatically pushed to you. Then when you connect to Wi-Fi– such as in the office, at a customer location, or in the hotel – you can download your data for free, as Wi-Fi usage does not count towards your data plan.
* Do not use your wireless internet roaming card outside of your home country. This would result in a large expense.
* You should turn off data roaming unless you are connected to a Wi-Fi hotspot.

## Home Office Expenses

### Eligibility

**Remote Employees** are individuals that:

* regularly work from home at least three days a week
* live more than 50 miles from a ZoomInfo office, and
* are approved by the department CXO

### Computer and IT Equipment

ZoomInfo will provide all home-office employees with a computer, software, monitors, VoIP phone and when appropriate a combination printer/scanner. All computer equipment will be provided by ZoomInfo’s IT department, and purchases by individual employees will not be reimbursed.

**Note:** this equipment is the property of ZoomInfo and must be returned to the company at such time that the individual leaves ZoomInfo.

## Combined Business and Personal Trip

From time to time, employees may want to utilize personal time off during business travel. Under no circumstances will ZoomInfo reimburse employees for additional expenses as a result of personal time taken during business travel. ZoomInfo accepts no responsibility for injury or liability incurred during personal trips within the scope of business travel. Costs for personal travel must not be charged to a company account under any circumstances, and any personal charges made in error must be reported immediately and deducted from the following paycheck.

### Personal Day

A personal day on a business trip includes:

* Weekends that an employee voluntarily stays over in a city or
* The days before or after the business portion of the trip that are for personal purposes
* Instead of returning on the first possible flight you select a return flight at the end of a day in order to sightsee or spend the time for other personal purposes

Employees that are working in the same or nearby city on back-to-back weeks have the option of flying home on the weekend or staying in the hotel over the weekend. If you decide to stay over the weekend these two days are considered personal days.

Personal days do not include staying over a weekend on an international trip outside of North America nor staying out of town over a weekend when work is being conducted during the weekend, such as if you’re attending a conference. When this occurs the limits below do not apply.

In general, any charges made during a personal day or personal travel on a business trip are not eligible for reimbursement, and a company credit card should not be used for these charges.

### Hotel Costs for Weekend Stays

If the employee chooses to stay in the hotel for the weekend during a multi-week out of town engagement, ZoomInfo will pay for two nights at the hotel in lieu of flying home, limited to the maximum in-policy hotel rate for that city. If an employee stays at a hotel that exceeds this amount, the employee must pay the additional hotel costs and taxes. Note that the employee must receive advance written approval from the department’s CXO in order to receive this reimbursement.

Any hotel costs incurred for an extended stay before or after the business portion of the trip is considered a non-reimbursable personal expense and should not be included on the employee’s expense report.

### Airfare

If an employee flies additional segments on an airline trip that is for personal purposes, these costs are personal. The ticket for the additional segment(s) should be booked separately.

### Rental Car

ZoomInfo only pays for ground transportation or rental cars for the business portion of a trip. Employees are responsible for the incremental cost incurred for the portion of the rental due to personal use.

To determine the amount of the car rental that is eligible for reimbursement, the employee must submit documentation from TripActions showing what the rental fee would be for just the business portion of the rental. **Note:** if the business trip is longer than a week, you can calculate the cost of a full week by multiplying the daily rate by 6 and then adding the daily rate for any additional business days.

Employees must also prorate the total fuel charges incurred during the trip. The eligible reimbursement amount is: total fuel costs x (number of business days on the trip / number of total days on the trip).

### Rental Car Insurance

The employee is responsible for any accidents or costs when the rental is used on a personal day. Employees may want to elect insurance coverage for the days that the car is used for personal purposes. If you elect insurance coverage for the entire trip, the insurance coverage during the business portion of the trip will not be reimbursed if the rental is within the United States.

### Meals and Entertainment

Employees are responsible for meals, entertainment and incidental expenses during a personal day of a trip.

### Airport Parking

Employees also must allocate the total airport parking charges incurred during the trip. Specifically, the amount that is eligible for reimbursement is: total airport parking costs x (number of business days on the trip / number of total days on the trip).

## Spousal, Family, or Significant Other Travel

Expenses of a spouse to accompany an employee are not reimbursable (except for attendance to a company approved event that includes spouses or significant others) unless the spouse is also an employee of ZoomInfo and they are traveling for valid business purposes. In the event that a spouse, significant other, or family member travels with the employee, all incremental expenses incurred as a result of the additional parties traveling with the employee are the employee's responsibility and must not be included on the expense-report form. These expenses will not be reimbursed.

### Currency Exchange Fees

The fees for exchanging currency or making payments in foreign currency – including currency exchange fees, credit card currency exchange fees, and international ATM fees – while traveling on business outside of your home country are reimbursable expenses. Of course, we do ask that employees try to minimize these costs as much as possible.

### Other Sundry Items

Employees may be reimbursed for business expenses related to incidental items (eg. power cords, cable network cords, phone chargers) that have been lost while traveling. Reimbursement for these items is limited up to $50 per year per employee.

## Non-Reimbursable Items

The following are travel related expenses not reimbursable by this policy:

### Air Travel

* Business or first class airfares, unless Director or above for international flights
* Frequent traveler membership fees
* Airline club dues or fees
* Airline headsets
* In flight purchased alcoholic beverages
* Layovers or changes in travel for the employee’s convenience
* Use of personal frequent flyer points/coupons to purchase business travel

### Transportation

* Traveling to/from the employee’s place of work from home
* Insurance purchased through rental car agencies when traveling in the USA or Canada
* Rental car upgrades to premium and luxury
* Traffic fines, parking tickets, and court costs
* Town car service unless pre-approved
* Incremental travel costs for spouse, family or significant other

### Lodging

* No show charges, unless approved
* Phone calls
* Pay TV or movies
* Charge for honor bars
* Upgraded rooms or concierge floors
* Laundry charges except for trips lasting 7 days or more (please use a local laundry facility if possible)
* Spa charges

### Communications

* Cell phones
* Home phones
* Home internet

### Meals and Entertainment

* Personal entertainment (sporting events, shows, movie tickets, magazines, newspapers, souvenirs, etc.)
* Cost of entertaining spouse, family or significant other
* Club, gym, or entertainment facility memberships

### Personal and Other

* Luggage or other such items
* ATM and credit card fees
* Salon, shoe shine, toiletries, or similar items
* Purchase or rental of clothing or accessories
* House sitting, child-care, pet sitting, pet boarding or elder-care services
* Personal property lost or stolen while traveling
* Personal telephone calls deemed excessive when traveling
* Tips in excess of 20%
* Home furniture
* Donations or unapproved gifts
* Interest, late payment or NSF charges

# Expense Policy

## Corporate Credit Cards

If eligible, ZoomInfo will provide employees with a corporate credit card that you can use to pay for your business related expenses, and ZoomInfo will pay both the annual fee and monthly bill for this card. This credit card is for business purposes only. Even though the bill will be paid by the company, you will still be required to submit expense reports in accordance with this policy in order to be reimbursed for these expenses.

## Expense Reports

### Receipts

Unless otherwise stated, in order to qualify for reimbursement and preserve our tax deductibility, receipts are required to be submitted for all expenditures unless approved by the Finance department. However, in the U.S. receipts are not required for tolls or parking under $25 and reasonable cash tips.

If original receipts are lost or are not issued, such as in the case of an online purchase or items that are electronically billed, you can submit copies of online purchase invoices or a credit card statement as the supporting documentation for the purchase.

For meals and entertainment costs, the employee must submit the actual receipts in addition to the following documentation with the expense report to satisfy any statutory and regulatory requirements:

* Names of individuals present, their titles and company name(s)
* The business topic discussed
* Name, date, amount and location of where the meal or entertainment was provided

### Expense Reports

Employees should submit expenses and receipts weekly using Expensify after incurring the expense or after the trip is completed.

Employees will not be reimbursed if improper approvals and documentation are received, and the reimbursement may be denied if the items were submitted more than 30 days after it was incurred.

Managers are expected to review all expense reports submitted for their approval.

Executive expense reports are to be submitted through Expensify and approved by the CEO monthly. The CEO’s expense reports are reviewed by the Board quarterly.

Please refer to the Procurement Policy for additional information.

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## Expenses

### Employee Appreciation

Employee appreciation is broken into two groups in expensify. “Employee Appreciation-Gifts/Other” This should include outings purchased from a manager to support their team. This can also include swag items like T-shirts or

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### Overtime Meals

When an employee works 11 hours or more on a weekday, the company will reimburse the employee for actual and reasonable meal costs not to exceed $25 per employee per day. Employees must be present for a full five-day work week and be based in the United States to be eligible. This does not apply to days worked from home and is not permitted during travel.

### Dues and Subscriptions

Dues and subscriptions related to industry and professional membership fees may be reimbursable and are subject to approval from employee’s department CXO.

### Seminars, Continuing Education

Costs incurred by employees for continuing education and professional certification programs (excluding colleges and universities degree programs) as they relate to job function are reimbursable. Costs incurred by employees for these programs must be pre-approved by the department’s CXO.

### Gifts

From time to time, managers may want to reward employees for outstanding performance or other events. Employees are allowed to purchase gifts subject to the following limitations:

* The maximum cost is $100 per person per event (including all shipping, wrapping, taxes, personalization, and other costs)
* The department’s CXO must pre-approve the purchase
* The employee submits the written pre-approval and in accordance with the procurement policy.

### Currency Exchange Fees

The fees for exchanging currency or making payments in foreign currency – including currency exchange fees, credit card currency exchange fees, and international ATM fees – while traveling on business outside of your home country are reimbursable expenses. Of course, we do ask that employees try to minimize these costs as much as possible.

### Other Sundry Items

Employees may be reimbursed for business expenses related to incidental items (eg. power cords, cable network cords, phone chargers) that have been lost while traveling. Reimbursement for these items is limited up to $50 per year per employee.

## Additional Information

### Payment

ZoomInfo provides a company paid credit card through Wells Fargo to many individuals that frequently travel or incur business expenses. **If you have a company paid credit card, all flights, hotel, meals, travel and other business expenses should be charged to this card.** For all other costs, you will need to pay for those personally and submit the receipts for reimbursement on an expense report. Employees should not use the company credit card for payment for personal trips, and any such use will be subject to disciplinary action.

### Passports and Visas

Employees are required to ensure that they have a current passport with at least 6 months validity beyond the expected return date prior to submitting a travel request form. Costs of obtaining passports and visas are reimbursable if they are required for company business and appropriate documentation has been provided.

### Exchange Rates

When traveling abroad, you should report expenses using the exchange rate used by your credit card company or, for cash purchases, the exchange rate in effect when these expenses were incurred, to determine the amount of the reimbursement. Currency conversion fees are also reimbursable.

## Vendor Applicability

This policy applies to all consultants, vendors, or other individuals providing goods or services to ZoomInfo. Employees negotiating these contracts should incorporate this policy into the vendor agreement. When including this in a vendor agreement, you may modify this policy to include more restrictive terms, but under no circumstances can the policy be made less restrictive without the CFO’s advance approval.

## Exceptions

All exceptions not specifically addressed in this Travel and Expense policy must be approved by the CXO.

# Definitions

CFO- Chief Financial Officer

CXO- The top executive for your department, such as the CEO, CFO, CHRO, COO, CMO, CRO, CIO, or CTO

VP- Vice President

VP and above- Includes Vice President and CXOs

Director and above- Includes Senior Directors, Directors, Controller, Vice Presidents and CXOs

Metro Area- A one-way distance of over 30 miles from your home