

GUIDELINES

Fitness & Financial Reimbursement (F/F)

As part of our commitment to employee wellness, per the 2025 National Agreement between Rolls-Royce and the UAW, we are offering a fitness and financial wellbeing subsidy to UAW represented Rolls-Royce employees, retirees, and their covered dependents.

- **Employee Eligibility:** Includes Active Employees, LOA (receiving benefits), Retired Employees and their Covered Dependents (on insurance), and dependents who qualify for benefits. Must be married for significant other to receive TAP benefit. Retiree spouse eligibility restrictions may apply.
- **Business Eligibility:** Must be registered business, includes government and township entities. Restrictions may apply.
- **Amount of Fitness & Financial Wellbeing Reimbursement:** \$1450 maximum per calendar, total for employee and/or their covered dependents.

Application Process for Fitness & Financial Reimbursement:

1. Complete section 1 on this form and include Registered Business information.
2. Include receipt, proof of payment, and other document that verifies participation in a qualifying fitness or financial activity. This Application authorizes the UAW-TAP program to approve the amount indicated above, up to the maximum allotment of \$1450 per calendar year.
3. Enter **self** and/or **covered dependent's name** on **Purchased For?** line.
4. Email, text, fax, or drop off to UAW-TAP for approval and reimbursement processing.
5. **Reimbursements will be made no more than once per quarter, annual reimbursement is preferred, through direct deposit.**

Covered by Fitness & Financial: (examples, but not limited to)

- Sports Leagues & Camps: golf, archery, basketball, baseball, softball, marching band, gymnastics, dance, swimming
- Health & Activity Tracker: smart watches & rings (Apple, Samsung, Fitbit, Garmin, Oura), blood pressure monitor, smart scale, oxygen monitor, EKG KardiaMobile tracker
- Fitness Subscriptions and Videos: Weight Watchers, Noom, National & State Annual Park Passes, iFit, BODi
- Fitness Membership, Classes, and Wellbeing: gym membership: YMCA, Crunch, Township Reg Centers, Exercise Inc., Crossfit, Orange Theory, Hancock Wellness, Planet Fitness, etc., Personal Trainer: weight, nutrition, strength & agility, yoga, martial arts, swimming (and lessons), scuba, dance lessons, ski/snowboarding lessons & season pass, Pilates, meditation, weight loss, acupuncture
- Financial Planning and Classes: newsletter, wills and trusts, retirement planning
- Discounts: YMCA: Indy 10% or Martinsville 15% (ID badge or letter required), ANTHEM.COM: Fitbit & Garmin

Not covered under Fitness & Financial: (examples, but not limited to)

- Club memberships: golf clubs, country clubs, social clubs, etc.
- Fitness equipment: treadmills, free weights, sneakers, golf clubs, etc.
- Financial Investment Fees, magazines, etc.
- Golf lessons, leagues: bowling, dart & pool, AED, diabetic monitoring, meals/supplements, services covered by insurance

Job Related (JR):

- **Employee Eligibility:** Active Employees Only (not on LOA)
- **Educational Provider Eligibility:** Must on pre-approved vendor list; contact UAW-TAP for more info.
- **Amount for Job Related:** \$2100 maximum, per calendar year.



Regionally Accredited (RA):

- **Employee Eligibility:** Active Employees Only (not on LOA)
- **Educational Provider Eligibility:** Must be Regionally Accredited; contact UAW-TAP for more info.
- **Amount for Regionally Accredited (RA) Colleges & Universities:** \$5200 maximum, per calendar year. Includes \$100 per book, per course. You may borrow \$1000 maximum from upcoming year's tuition allotment, except in last year of current contract.

Application Process for Job Related & Regionally Accredited Courses

1. Complete section #2 to the best of your ability; your educational institution or TAP representative is available to help.
2. Course code, tuition cost, and compulsory fees are mandatory to process RA approval.
3. This Application authorizes the UAW-TAP program to approve the amount indicated above, up to the maximum allotment per calendar year. You are responsible for any tuition cost and/or fees over this amount.
4. If for any reason, the course you planned to enroll in is not available (class is filled or canceled) see a school counselor if you wish to select an equivalent course to satisfy your educational goals.
5. All course changes should be sent to the UAW-TAP office on a new application; an updated approval will be sent directly to the educational institution.
6. If you decide not to attend or need to withdraw: 1. Contact your Educational Institution, at your earliest convenience, as there may be a fee(s) to withdraw. 2. Notify the UAW-TAP program to ensure fees are paid correctly.
7. **In case of refund: Should the educational provider inadvertently send refunded monies directly to you, contact the UAW-TAP office immediately. Your future eligibility may be negated if monies are not returned.**
8. Your **official** grade report, transcript, or completion certificate should be sent to the UAW-TAP program within 45 days of the term ending date.