



IRON MOUNTAIN ADOPTION ASSISTANCE BENEFIT SUMMARY

Program overview

To offer assistance to employees who are building families, a program has been developed to provide eligible employees with adoption benefits—including financial reimbursement and adoption leave of absence.

Eligibility

Effective January 1, 2014, all full-time employees are eligible for adoption benefits after six months of employment. If an employee and his/her spouse/domestic partner both work at Iron Mountain, only one employee can utilize the financial benefit, but parental leave may be shared between the two parents. The employee must be actively employed at the time any financial obligation is incurred and at the time reimbursement is made. Adopted children, to be considered for this benefit, must be under the age of 18.

Expenses eligible for financial reimbursement

Eligible adoption-related expenses will be reimbursed to a maximum lifetime of **\$5,000.00**. Most expenses directly related to the adoption are reimbursable. These include:

- Application fees
- Home studies
- Agency and placement fees
- Legal fees and court costs
- Immigration and immunization fees
- Transportation, meals and lodging while away from home

What Expenses are not eligible?

- Voluntary donations to adoption agencies
- Expenses related to the adoption of children 18 years of age or older, unless physically or mentally incapable for caring for himself
- Any costs when an adopting parent is the step parent, or grandparent of the child being adopted.
- Charges associated with legal guardianship
- Costs covered by insurance
- Any costs incurred to adopt spouse or domestic partner's child
- Costs for carrying out a surrogate parenting arrangement or that violate provincial or federal law

How to Submit Charges?

- Contact HRConnect Provide copies of all supporting documentation and receipts.

How Will the Claim Be Paid?

Payroll will issue a cheque once the adoption form is completed with required document to the HRConnect. Payments may be subject to taxes. For a copy of the plan document that governs the Iron Mountain Adoption Assistance Program, please contact HRConnect. In the event of a conflict between the plan document and this summary, the plan document will control.



Adoption Assistance - Frequently Asked Questions

- ***Will I be eligible to receive adoption assistance if I adopt a child from another country?***

Yes, you are eligible for the adoption assistance if your child is adopted from any country as long as you can produce the necessary documentation.

- ***What adoption documentation is needed to receive the \$5,000 assistance?***

Employees must submit receipts for paid qualified expenses to receive reimbursement. Qualified adoption expenses are reasonable and necessary adoption fees. They include but are not limited to: court costs, attorney fees, traveling expenses and other expenses directly related to the legal adoption of an eligible child. Expenses paid in an unsuccessful attempt to adopt an eligible child before finalizing the adoption of another child do not qualify.

- ***At what point in the adoption process is the adoption assistance benefit paid?***

You will be eligible for reimbursement once the adoption is finalized. . You cannot be reimbursed until all documentation is complete and approved.

- ***Can I adopt more than one child and receive more than one payment of \$5,000?***

The maximum payment per employee/household is \$5,000. The payment is not based on the number of adoptions that you have.

- ***Does the adoption have to be finalized after January 1, 2014 to eligible for the benefit?***

Yes, the adoption has to be finalized on or after January 1, 2014. Adoptions finalized before then are not eligible for the reimbursement.

- ***Does this assist in the adoption of stepchildren?***

No, the adoption assistance program does not assist in the adoption of a stepchild.

- ***If two employees are married do they each get the benefit or is it one benefit per couple?***

The adoption assistance program is based on one reimbursement per family.

- ***Where do I find the adoption assistance request form?***

Forms can be found on HRConnect or by contacting a HRConnect Advisor.

- ***What does HRConnect do with the form?***

A representative approves documentation and forwards to payroll for payment.



ADOPTION ASSISTANCE REIMBURSEMENT REQUEST

Amount Requested: _____

Employee Name: _____ EMP ID: _____

Date of Adoption Finalized: _____

Eligible Expenses up to \$5,000 lifetime maximum

- Application fees
- Home studies
- Agency and placement fees
- Legal fees and court costs
- Immigration and immunization fees
- Transportation, meals and lodging while away from home

Ineligible Expenses

- Voluntary donations to adoption agencies
- Expenses related to the adoption of children 18 years of age or older, unless physically or mentally incapable for caring for himself
- Any costs when an adopting parent is the step parent, or grandparent of the child being adopted.
- Charges associated with legal guardianship
- Costs covered by insurance
- Any costs incurred to adopt spouse or domestic partner's child
- Costs for carrying out a surrogate parenting arrangement or that violate state or federal law

An individual must be an eligible employee when the expense is incurred and at the time of payment to receive reimbursement. Benefits will only be paid for qualified adoption expenses after the adoption is final.

By signing this Request, you agree to be bound by the terms and conditions of the Iron Mountain Adoption Assistance Program, and certify that the amount requested has not been nor will be reimbursed by any other source. If you receive reimbursement from the Company under this Program and are later reimbursed for the same expense(s) from another source, you must repay the reimbursement under this Program to the Company to the extent of the duplication. Claims must be submitted within **90 days** of the finalized adoption date.

Please attach copies of all pertinent receipts and proof of qualified adoption expenses to this Request. Return this request and the documentation to the HRConnect

Employee Signature

Date

HRConnect Name

HRConnect Signature

Date HRConnect Signed

Date given to Payroll