

## Adoption/Surrogacy Assistance Reimbursement Request

You're eligible to receive Adoption and/or Surrogacy Assistance if you're classified as a regular employee working a minimum of 20 hours per week and are not classified as temporary, intermittent, intern, or co-op and you have eligible expenses related to adopting a child or a child being born via surrogate. Reimbursement will not exceed \$15,000 per child.

Within 180 days from the adoption/surrogacy finalization date, the completed form with all required documentation must be uploaded to NetBenefits or faxed to **855-810-8223**. All documentation must be submitted at once with this form. Required documents are proof the adoption/surrogacy (either successful or unsuccessful) is final by providing a notarized affidavit or legal binding agreement, a birth certificate showing the child's name and date of birth (if applicable), and itemized receipts of expenses incurred by you.

**Are you requesting reimbursement for Adoption or Surrogacy Assistance?**  Adoption  Surrogacy

**Have you received Adoption and/or Surrogacy Assistance before?**  Yes  No If yes, provide previous amount(s) and year received \_\_\_\_\_

### Information about you:

Employee Last Name (Print)	Employee First Name (Print)	Employee ID (e.g., U10555, B21333)	
Employee Mailing Address	City	State	Zip
Work or Personal Email	Phone Number		

### Information about your child:

Child Last Name (Print)	Child First Name (Print)	Child Date of Birth (MM/DD/YYYY)	
Agency	Agency Contact		
Agency Address	City	State	Zip
Agency Phone Number	Date of Adoption/Surrogacy Finalization (MM/DD/YYYY)		

**A list of eligible expenses are detailed below. Provide a breakdown for each eligible expense in the fields below. If you have more eligible expenses than allowed in the space below, attach your additional information to this form. Reimbursement will not exceed \$15,000 per child.**

Date of Expense	Description of Expense	Amount
<b>Total (not to exceed \$15,000 per child)</b>		<b>\$</b>

Upon receipt of receiving your reimbursement request, Fidelity generally will review and provide a response within 3-5 business days. Forms that are incomplete or missing required documentation will be placed in a pending status until additional documentation is provided. If documentation is not provided within 30 days, your claim will be denied. Approved claims will be paid, less applicable tax withholdings, through the K-C payroll system as soon as administratively possible. Please allow a minimum of 14 business days from the claim approval date for payroll processing.

I certify that the information provided on this form is correct and complete. I certify that the expenses for reimbursement requested for adoption and/or surrogacy have been incurred, by me, in the process of obtaining a legal adoption/surrogacy of the above-referenced child. Further, I certify that the adoption/surrogacy of the above-referenced child has been finalized. In the event I received reimbursement for an ineligible expense, I hereby agree to reimburse K-C for these amounts, and consent to have the repayment taken from other wage payments I receive from K-C. All submissions for reimbursement are subject to audit and K-C's Code of Conduct. Any fraudulent claim to seek reimbursement under the Adoption & Surrogacy Policy may result in disciplinary action up to and including termination of employment.

**Employee Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## K-C Adoption/Surrogacy Assistance

You're eligible to receive Adoption and/or Surrogacy Assistance if you're classified as a regular employee working a minimum of 20 hours per week and are not classified as temporary, intermittent, intern, or co-op and you have eligible expenses related to adopting a child or a child being born via surrogate. Reimbursement will not exceed \$15,000 per child.

Details and applicable rules of this benefit are governed by the *Internal Revenue Service* (IRS) and set forth in the Adoption & Surrogacy Assistance Policy found on NetBenefits > Flexible Spending and Reimbursement Accounts > Forms & Information.

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### Criteria for Eligibility

- You're a regular employee working a minimum of 20 hours per week and are not classified as temporary, intermittent, intern, or co-op.
  - You're eligible for reimbursement as long as the finalization date is before your termination date.
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### Eligible Adoption Expenses

- Domestic and foreign agency and placement fees
- Travel expenses necessary for the adoption, including airfare, parking, tolls, taxis, rental cars, buses, gas for a car or mileage, lodging, and meals
- Temporary foster care provided before permanent placement of the child in your home
- Miscellaneous fees such as immigration, immunization, and translation fees
- Legal fees and court costs associated with the adoption
- Counseling fees associated with the placement and initial adjustment
- Expenses that were part of an unsuccessful attempt to adopt a child
- Home inspection costs
- Expenses incurred before the adoption became final to care for children under the age of 18 and age 18 or older with special needs (for example, the purchase or rental of a wheelchair)

### Eligible Surrogacy Expenses

- Domestic and foreign surrogate agency fees
  - Egg and/or sperm donation agency fees
  - Egg and/or sperm donation shipping and transport fees
  - Travel expenses necessary for the surrogacy, including airfare, parking, tolls, taxis, rental cars, buses, gas for a car or mileage, lodging, and meals
  - Miscellaneous fees such as immigration, immunization, and translation fees
  - Legal fees and court costs associated with the surrogacy
  - Expenses that were part of an unsuccessful attempt to gain a child that is born via surrogate (only if not covered by another source)
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### Exclusions

- An individual not classified as defined above
- Expenses incurred prior to the effective date of this policy or to the eligibility date of the employee
- Expenses for which you take a credit or deduction under any other federal income tax rule
- Expenses that are reimbursable by your employer under another program
- Expenses that are reimbursed by another employer (i.e., spouse/partner's employer)
- Reimbursement will not exceed \$15,000 per child