EDUCATIONAL ASSISTANCE PROGRAM APPLICATION INSTRUCTIONS

This application must be completed fully and signed by you. Submit this form after you have completed your class.

How to Apply for Benefits:

1. Discuss academic educational plans with your manager in conjunction with your career plan.
2. Obtain course/program approval from your manager and AskHR via email prior to registering for a class.
3. If approved by your manager and AskHR, register and pay for the course or program. Be sure you obtain a list of your course required books and itemized receipts with tuition breakdown. 
   **Note:** When requesting reimbursement of tuition and book expenses, please refrain from using another brand of payment card. Complete the program and obtain your final grade report or certificate of completion.
4. Completed U.S. Educational Assistance Application/Reimbursement Form
5. Email the following documentation to AskHR@visa.com:
   - Pre-approval email from your manager and AskHR
   - List of course required books
   - Book receipts
   - Itemized tuition invoice
   - Proof of payment - (i.e. Credit/Debit Card, Scholarship, Grant, Student Loans, etc.)
   - Course beginning and end date documentation
   - Grade reports/certificate of class completion. If your grade is not available within 3 months of course completion, email AskHR

NOTE: Incomplete documentation will result in delayed processing.

For any questions regarding the eligibility of an expense contact AskHR via email at AskHR@visa.com or by phone at (844) 287-2754. The final approval for reimbursement is determined by AskHR.

NOTE: You must file for reimbursement within three months of completing a class/course and receiving your passing grade regardless of whether you have exceeded the maximum ($5,250) amount for the calendar year. Amounts over $5,250 will be deferred. Forms received after three months of completion WILL BE DENIED. Eligible expenses are processed each pay period. All reimbursements will be included in your regular paycheck. Please allow 1 to 2 pay periods for your reimbursement.
Educational Assistance Application/Reimbursement Form

<table>
<thead>
<tr>
<th>Employee Number</th>
<th>Name</th>
<th>Department/Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extension Number</td>
<td>Job Title</td>
<td>Mailstop</td>
</tr>
<tr>
<td>School</td>
<td>State</td>
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</tr>
</tbody>
</table>

Type of Degree – Please check one:

- **GRADUATE**
  - Masters
  - Doctors
  - PhD
  - Specify Degree ________________ (Required)

- **UNDERGRADUATE**
  - Associate
  - Bachelors
  - Specify Degree ________________ (Required)
  - Continuing Education from an accredited institution

- **CERTIFICATE PROGRAM**
  - Industry Certification
  - Corporate I.T. Certification**
  - Specify Program ________________ (Required)

*If changes to Visa Systems are requiring this certification, these expenses are considered training and not eligible for reimbursement under the Educational Assistance Program.*

<table>
<thead>
<tr>
<th>Course Title(s)</th>
<th>Course End Date</th>
<th>Grade</th>
<th>Tuition Cost</th>
<th>Books Cost</th>
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</thead>
<tbody>
<tr>
<td>1</td>
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*Attach additional pages if needed.*

**TOTAL**

**EMPLOYEE CERTIFICATION (REQUIRED)**

- I am applying for benefits under the Visa Educational Assistance Program. I understand that in order to be eligible for reimbursement, I must complete the course with at least a passing grade (C or better, Pass, Credit, or Successful Completion – depending on the grading system.)
- I understand that reimbursement under the Educational Assistance Program MAY BE TAXABLE under IRS rules and regulations in effect at the time of reimbursement and that my employer is required by law to withhold taxes as applicable.
- I authorize Visa to contact my school and any sources of financial aid, if necessary to obtain any information regarding my grades, billing, coursework, financial aid, or any other information needed to process my tuition refund request.
- I understand that expenses are eligible for reimbursement only after completion of course(s) and **must be received within three months of the course end date to be accepted and that forms received after three months of completion WILL BE DENIED.**
- I certify that all information on this application is true and correct.

<table>
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<tr>
<th>Employee’s Signature</th>
<th>Date</th>
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</table>

**HUMAN RESOURCES ONLY**

<table>
<thead>
<tr>
<th>Date of Reimbursement</th>
<th>Total Cost $</th>
<th>Total Amount Reimbursed $</th>
<th>Amount Deferred $</th>
<th>Benefits Signature</th>
</tr>
</thead>
</table>

Return this completed form along with the required documentation via email to AskHR@visa.com. You may interoffice hard copies to the Austin-HR mailstop, but this will increase the amount of time it takes to have your application reviewed and processed for payroll. Forms received after DECEMBER 5 will be applied to the following calendar year maximum.