

SECURITY BENEFIT FUND

APPLICATION FOR PRIVATE SCHOOL TUITION BENEFIT

- All information on this application must be completed.
- Private School Tuition Benefit is a reimbursement for all participants who have incurred educational expenses for their children or legal dependents who are enrolled in an accredited private school, grades kindergarten through 12. A claim filed for someone other than your child must be listed as a dependent in the Welfare Fund.
- Please complete this application and submit receipts, invoices, canceled checks and credit card statements.
- The expenses covered under this section include, but are not limited to tuition and school supplies, such as laptop computers and other related items, provided they are purchased through the institution and included in the tuition bill.
- The tuition bill must include the students' name, the semester dates, itemization of charges and the school's name and address.
- You are responsible for paying for the school tuition and will be reimbursed from the Fund. Proof of your payment (cancelled check, credit card statement, etc.) must be included.
- If you wish to adjust your tax withholding, please complete forms W-4 (Employee's Withholding Certificate) and IT-2104 (New York State Employee's Withholding Certificate). Once the tax forms are received, we will use your updated withholding elections for all taxable disbursements from the Security Benefit Fund.
- This benefit is subject to all Federal, State, City and FICA taxes and will be reported on Form W-2 at year end.

Name: _____ Book Number: _____

_____ Home phone

_____ Mobile

_____ E-mail

Claim is for: _____ Dependent's Name _____ Age _____

Amount Requested _____ (Not to exceed account balance)

SIGNATURE _____ **DATE** _____