



## TEAM TACALA CHARITIES STAR FUND (THE FUND)

### GENERAL INFORMATION

#### Why was the Team Tacala Charities Star Fund established?

To further reinforce our community of caring, we wanted to provide a way to assist employees experiencing a crisis situation. The Team Tacala Charities Star Fund (“the Fund”) was established to provide financial assistance to Tacala employees who've experienced hardship due to events beyond their control, including disasters, extended illnesses or injuries, and other special situations involving significant personal hardships. The Fund's grants can help pay for essential immediate living expenses, such as housing, utilities, food, clothing and other basic necessities. Please keep in mind that the Fund's operations are governed by rules established by the IRS that may, in some cases, limit its ability to address certain situations.

#### What is the Team Tacala Charities Star Fund?

The Fund is a 501c3 public charity that was established so Tacala employees can help fellow employees who are experiencing significant personal hardships.

#### What qualifies as a significant hardship?

The Fund is designed to assist Tacala employees who experience a qualifying event or situation that leaves them unable to meet essential needs such as food, clothing, shelter, utilities, or other basic necessities. The event must meet the Fund guidelines and the emergency/hardship must be the result of an illness/injury, disaster or other situation that is beyond the applicant's control.

#### What is considered a qualifying event?

Disaster events which include:

- Natural disasters, including but not limited to devastating flood, ice storm, hurricane, tornado, or wildfire that impact a particular area
- Damage to primary residence such as fire, flood, pipe burst, etc.

Personal hardship events which include:

- Extended illness or injury of the employee or a qualifying dependent
- Unexpected death of a qualifying dependent
- Domestic Violence

#### How much assistance will I receive?

Grants will typically range from \$500 to \$2500, depending on the situation.

#### What needs do the Fund grants help cover?

Eligible expenses due to a disaster event or personal hardship include the following:

- Shelter
- Food
- Clothing
- Past due utilities (e.g., gas, water, electricity)
- Other basic necessities
- Past due rent/mortgage
- Funeral expenses
- In the case of home damage, the grant helps cover the cost of repairs

## Who can Apply?

Only Tacala employees and their eligible dependents may receive assistance from the Fund. To be eligible to apply an employee must meet all of the following requirements:

- The employee must be employed at the time of the qualified event and at the time of the grant payment
- The employee must have been continuously employed for the six months prior to the time of the qualified event and must have worked an average of at least 16 hours per week during that period
- The employee's application must be received within 30 days of the qualified event. The employee must provide all requested supporting documentation within 45 days of the application submission date.
- The employee must not have already received a grant from the Fund during the 12-month period immediately preceding the date of the qualified event
- The employee must not have other funds that are immediately available from any other source, including insurance. The Fund Committee may request evidence or an affidavit to demonstrate that other funds are not available.

## Who is considered a dependent?

The following individuals that the employee is financially responsible for:

- Lawful Spouse
- The applicant's unmarried child, under age 19 and who resides with the applicant, or (if not residing with the applicant) receives over half of his/her support in the current year from the applicant; "child" means the applicant's natural child, legally adopted child, stepchild, or another child for whom the applicant is legal guardian (provided that a natural parent of the child does not also reside with the applicant);
- The applicant's child under age 25 who is a full-time student and who receives over half of his/her support in the current year from the applicant; "full-time student" means a person who is enrolled full-time in and attending an accredited secondary school, college, or university; or
- The applicant's child who is age 19 or older and prevented from self-sustaining employment because of a physical or mental handicap, provided the incapacitation occurred prior to the child attaining age 19 and that the child receives over half of his/her support in the current year from the applicant.

You will be required to provide proof of dependent status with your application.

## Where can employees go to apply?

Online: <https://www.tacala.com/culture/>

By email: [starfund@tacala.com](mailto:starfund@tacala.com)

To apply for aid, employees in need of assistance can complete an application on Tacala's website, under the Culture section, or can fill out a paper application and submit via fax or email. You may request a copy of the paper application by emailing [starfund@tacala.com](mailto:starfund@tacala.com). Once the application has been submitted and all required documentation has been received by the Fund, the non-voting member of the Fund Committee will review the application and submit it without the employee's identity to the Fund Committee. The Fund Committee will review the application and either approve based on the established criteria, approve with a modification, or reject the application with supporting explanation.

## COMMON QUESTIONS

### **My spouse and I both work for the Company; can we both apply for assistance?**

Only one employee per household may apply for each qualified event.

### **My roommate and I both work for the Company; can we both apply for assistance?**

Yes, if assets are not shared between roommates, you both can apply.

### **A relative experienced damage to their home, can I apply for assistance to help them?**

No, only Tacala employees are eligible for assistance from the Fund for damage to a home.

**Can I apply twice?**

Yes, but not within a twelve-month period.

**Do power outages qualify?**

Only for major disaster events that cause a power outage of 4+ days.

**What are examples of expenses that do not qualify for financial assistance for personal hardships? (Please note the list below is not comprehensive but provides examples of expenses not covered).**

- Adoption
- Legal/court fees, fines, bail
- Expenses associated w/ divorce or child custody issues
- Illegal behavior or situations that occur due to drug or alcohol use
- Debts/loans
- Car maintenance, repair, registration, etc.
- Lost wages due to missed time from work
- Bad debt/overdue bills from ongoing financial problems

**I was in a car accident and lost my only means of transportation. Can I apply for help?**

The Fund does not assist with vehicle loss or repair unrelated to a natural disaster.

**How long does it take to process my application?**

It depends on when we receive the application and the required documentation, but the goal of the Fund Committee is to process applications within 2-3 days after receipt of required information.

**How will I know if my application is approved?** We will email you.

**How will I receive my funds?** If you have a direct deposit account set up with a Tacala payroll company, we can deposit the funds into your account.

**When will I receive my funds?** Funds will be distributed within 10 business days after the request is approved.

**Is this a loan? Do I have to pay it back?** No, this isn't a loan. You do not have to pay the funds back.

**Is the payment that I received from the Fund considered taxable income?** No, payments from the Fund are not considered part of the recipient's taxable income.

**Who can donate to the Fund?**

Anyone, including employees, vendors or guests, may donate to the Fund by completing a donation form available at all Tacala locations. Employees can donate to the Fund with a one-time payment via check, PayPal, etc., or donate a designated amount each pay period through payroll deduction. We recommend and encourage employees to use payroll deduction as an easy way to contribute.

If a Tacala employee contributes via payroll deduction, there is a minimum donation of \$5 per pay period. Payroll deductions will begin the first paycheck after the Fund donation form is received and will continue until the employee requests to stop or change the deduction.

**Are the donations tax deductible?**

Yes, all donations to the Fund are 100% tax deductible, subject to applicable Federal or state limits.

**Can I designate my donations for a specific employee or coworker or in honor of someone?**

Due to IRS rules, the Fund cannot accept contributions that are designated for one specific person or family. Donations can be accepted in memory of others.

**Will I know the identity of those that receive assistance from the Fund?**

No, only general award information will be available, but an annual impact report will be provided to donors.

**Does Tacala match employee donations to the Fund?**

No, but Tacala covers all administrative costs related to running the fund. This allows for 100% of the donations to go directly toward providing grants to employees with a qualifying need

**How is the Fund administration structured?**

The Fund is governed by a Board of Directors who in turn authorizes a Fund Committee to review the applications and make recommendations.

**How is the Fund Committee determined?**

The Fund Committee will represent a broad spectrum of employees of Tacala LLC who understand that they are acting as agents of Team Tacala Charities rather than as representatives of Tacala LLC. At least 50% of the Fund Committee shall be comprised of persons who are not officers of Tacala LLC. The Fund Committee may include individuals who are not employed by Tacala LLC. Members of the Fund Committee will serve on a voluntary basis for three years or until he or she resigns prior to completion of their term.

**Are applications for assistance confidential?**

Yes, the non-voting member of the Fund Committee will ensure strict confidentiality. Only the non-voting member of the Fund Committee and the Controller will know that you applied for assistance. If approved, the non-voting member of the Fund Committee will coordinate with you to disburse funds. Assistance will come from the Fund and will not be a part of your normal wages.

**Will you have to show how you used money received from the Fund?**

Yes, you will be required to provide evidence of how you use payments received from the Fund. The IRS requires that the Fund Committee monitor how grants from the Fund are used to ensure they are used for their intended purpose.

If your question was not answered, please email [starfund@tacala.com](mailto:starfund@tacala.com).