



Union Education Trust
Shaping Your Future

EDUCATIONAL BENEFIT TAX EXEMPTION FORM

(Request for employer determination of qualifying work-related education)

DIRECTIONS:

- 1) Complete sections A, B, C, and D.
- 2) Take the form to your agency's HR department to complete section E.
- 3) Upload your signed form at MyUET or submit by mail, fax or e-mail.

If you have any questions regarding your application or the application process, contact the Union Education Trust at 1-866-436-7900 or by e-mail at support@uedtrust.org

Important

To ensure timely processing, this form must be received by UET within thirty (30) days from the date when the application for reimbursement, pre-payment or voucher was received.

Rev. 2019-03

Section A: EMPLOYEE INFORMATION

EMPLOYEE IDENTIFICATION NUMBER: _____
 Last Name: _____ First Name: _____ Middle Initial: _____
 Job or Working Title: _____ State Agency: _____
 Daytime Phone Number: _____

Section B: SCHOOL & COURSE INFORMATION

School or Training Provider Name: _____
 Course Title: _____ Course Number: _____
 Term Start Date: _____
 This course is a: (Check One)
 College credit course Conference, seminar, or workshop
 Non-college credit course Other

Section C: EXPLANATION

Fully explain the purpose of this training and how it relates to your position with the agency.
 Attach any additional documentation to support this training as needed or required (e.g., official course description, agenda, a separate sheet of explanation etc.)

Section D: EMPLOYEE SIGNATURE

AGREEMENT: I represent that the information in the application is true and accurate to the best of my knowledge and belief.

Signature: _____
 Date: _____

Submit Your Signed Form

- ✓ **UPLOAD:** www.UEdTrust.org/MyUET;
- ✓ **FAX:** 1-866-436-7983
- ✓ **E-MAIL:** support@UEdTrust.org; **OR**
- ✓ **MAIL:** Union Education Trust
P.O. Box 3270
Westerville, OH 43086

Section E: AGENCY DETERMINATION

For Agency HR Office Use Only

By placing my signature below, I verify that I have conducted an analysis pursuant to the guidance laid out by the IRS in Publication 970 as it relates to which tuition expenses are exempt/not exempt from taxation and have determined the above-referenced as qualifying work-related education.

_____ Date

Management Representative Signature, Title