

# Lifestyle Spending Account Plan

Established by Human Interest | Administered by WEX



WEX is proud to be the administrator of your lifestyle spending account. This reimbursement plan has been established by Human Interest to reimburse several everyday expenses that may be applicable to you.

## Benefit Summary

Plan Year: January 1, 2026 – December 31, 2026

Eligibility: Full-time regular employees are eligible for this plan as of the first of the month following or coinciding with your date of hire.

Benefit Amount: Employees' accounts are funded with \$100 on the 1<sup>st</sup> day of each quarter, or \$400 per year. Unused funds roll over each quarter. However, unused funds at the end of each year do not roll over into the next plan year. Should your employment with Human Interest end, you will have 30 days to submit any claims for reimbursement that you incurred while you were an active employee.

Taxation: Please keep in mind that reimbursements issued from this benefit are considered taxable and will be imputed as income through payroll.

**Eligible Expenses:** You may submit claims for eligible expenses that incurred during each quarter.

**Your date of payment is considered the date of services incurred.** Spouse and dependent expenses are not eligible.

### Physical Wellness:

- Athletic equipment and accessories
- Exercise equipment
- Gym, health club, spa, and fitness studio memberships (also rock climbing, martial arts, tennis, etc.)
- Fitness classes (yoga, Pilates, spin/cycle, dance, etc.)
- Fitness trackers (Fitbit, Apple Watch, etc.)
- Lessons (golf, swimming, tennis, dance, etc.)
- Personal trainer
- Entry fees (marathons, leagues, etc.)
- Passes (ski, snowboard, golf, swimming, etc.)
- Fitness Trackers (Fitbit, Apple Watch, etc.)

### Financial Wellness:

- Student loan reimbursement
- Home purchase expense reimbursement (down payment, closing costs, etc.)
- Financial advisor and planning services
- Financial seminars and classes
- Identity theft services
- Pet insurance premiums

### Emotional Wellness and Other Wellness:

- Meditation classes
- Retreats (leadership, spiritual, etc.)
- Pet care (walkers, day care, grooming, etc.)
- Camping (equipment, fees, etc.)
- Personal development classes (art, cooking, etc.)
- Annual park pass
- Hunting and fishing licenses

**Other Eligible Expenses:**

- Auto accessibility modifications
- Auto insurance
- Automotive products and maintenance services
- Beauty and spa services
- Clothing services
- Driving lessons
- Vehicle registration
- Wedding planning service fees
- Pet services and supplies
- Bike and scooter shares
- Ferries
- Auto fuel
- Auto charging stations
- Parking and tolls
- Roadside assistance
- Shuttle and bus passes
- Taxis and rideshares
- Train and subway passes
- Vehicle registration
- Phone, internet, and television expenses
- Books
- Camera and film supplies
- Crafts and games
- Event tickets
- Gaming consoles and accessories
- Magazines and newspapers
- Movie and TV streaming
- Music and podcasts
- Party supplies
- Performing art and visual art
- Video games and gaming apps
- Dependent and elder care
- Home and garden
- Makeup and cosmetic products
- Moving, shipping, and storage services
- Roadside assistance
- Safety, security, and surveillance equipment expenses
- Dependent schooling
- Family planning courses
- Funeral service fees
- Incontinence products
- Accounting and bookkeeping services
- Estate planning services
- Student loan services
- Tax preparation services
- Beverages
- Food
- Food or beverage subscriptions and services
- Apparel accessories
- Clothing
- Fitness events and day passes
- Foam rollers and massage devices
- Footwear
- Meditation and sleep apps
- Nutritional counseling (unless prescribed by a doctor)
- Vitamins and dietary supplements (unless prescribed by a doctor)
- Wearable technology
- Charitable donations

**Ineligible Expenses:**

- Expenses not listed on this document
- Expenses considered to be "Medical Care" under IRS Code Section 213(d)

## Claim Submission

**Please note:** You will need to upload a receipt that includes the date, type of service or item purchased, amount, and merchant name.

### Mobile App

- 1) Tap "File A Claim" and select the account from which you're requesting reimbursement.
- 2) Tap "Add New Payee" or tap an existing payee.
- 3) Complete the required fields on the Claim Details screen.
- 4) Scroll down and then tap "Upload Receipt" to upload the documentation associated with your claim. You may take a photo with your camera, upload a photo from your camera roll, or access your receipt organizer.
- 5) After the documentation is added to the claim, tap "Submit" to submit the claim for processing.

**Note:** your documentation will be processed within 2 business days. Reimbursement will be issued as a direct deposit or mailed as a check, depending on your plan setup. You'll be notified if further documentation is needed. If you have an email address on file, you'll be notified via email. Otherwise, you'll be notified by mail.

### Online

- 1) Log into your online account.
- 2) Navigate to the Home tab and click Reimburse Myself in the "I Want To" section.
- 3) Click "Upload Valid Documentation".
- 4) Click "Browse for a file", select the file containing your receipt, and click "Open" and then "Submit" (receipts must be in a JPG, JPEG, GIF, PNG, or PDF format and can't exceed 8 MB).
- 5) Click "Next".
- 6) Complete the required fields and then click "Next".
- 7) Review your transaction summary. If changes are needed, click "Update". Then click "Submit".

**Note:** You'll receive a confirmation message that verifies the claim was successfully submitted. Your documentation will be processed within 2 business days. If the claim is approved, a reimbursement will be issued via direct deposit on the 3<sup>rd</sup> business day. If you don't have direct deposit set up, a check will be mailed on the 3<sup>rd</sup> business day. See "How to set up direct deposit" in your online account for more information.

You'll be notified if further documentation is needed. If you have an email address on file, you'll be notified via email. Otherwise, you'll be notified by mail.

Once a claim has been filed, it cannot be cancelled.