



POLICY: Team Member/Former Team Member/Board Member Discount on Entrance, Membership and Monthly Service Fees

<i>Original Implementation Date:</i>	1/2015	<i>Date Reviewed/ Revised:</i>	6/2024	<i>Area of Responsibility:</i>	Compliance	<i>Version:</i>	3
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PURPOSE: The purpose of this policy is to establish team member/former team member/board member discount associated with Sun Health’s senior living operations. Eligible for the discounts are the team member/past team member/board member (current or former), their immediate family, children, spouses, parents, grandparents, grandchildren, brother/sister, stepbrother/sister, father/mother/sister/brother in-laws.

Sun Health Program Discount: A team member/former team member/board member shall be eligible for a program discount based on the schedule below (provided they otherwise meet the program requirements and qualifications for the services sought).

<u>Years of Service</u>	<u>Discount</u>
0 to 5	2%
6 to 10	5%
11 to 20	7.5%
>20 years	10%

In providing the discount, the team member/former team member/family member/board member shall receive disclosure that the discount is provided through interpretation of IRS Regulations that it is not taxable to the respective team member/retiree/family member/board member. The individual will be encouraged to confer with their personal tax advisor regarding the appropriate tax treatment of the discount value.

Team members and retirees (including spouses) will be responsible for providing proof of years of service when the break in service is longer than 5 years.

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