

#FirstServeOthers

The FirstService Relief Fund

EMPLOYEE INTRODUCTION & OVERVIEW



FirstService

FirstService Relief Fund



Introduction

The companies of FirstService are united in our belief that our people are our greatest asset. While we each offer different benefits packages, there is one benefit that's available throughout all of our companies and Brands, the **FirstService Relief Fund**.

The FirstService Relief Fund was established to help our people during times of personal financial hardship.

This short presentation will provide a high level overview of the Fund, including how it works, eligibility criteria, what types of events would warrant applying for a grant and information on what types of expenses are not covered.

On our Social Purpose website (purpose.firstservice.com), under Our People, we provide detailed information – in English, Spanish and French Canadian – on the Fund along with helpful FAQ guides.

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About The Relief Fund

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Multiple language options



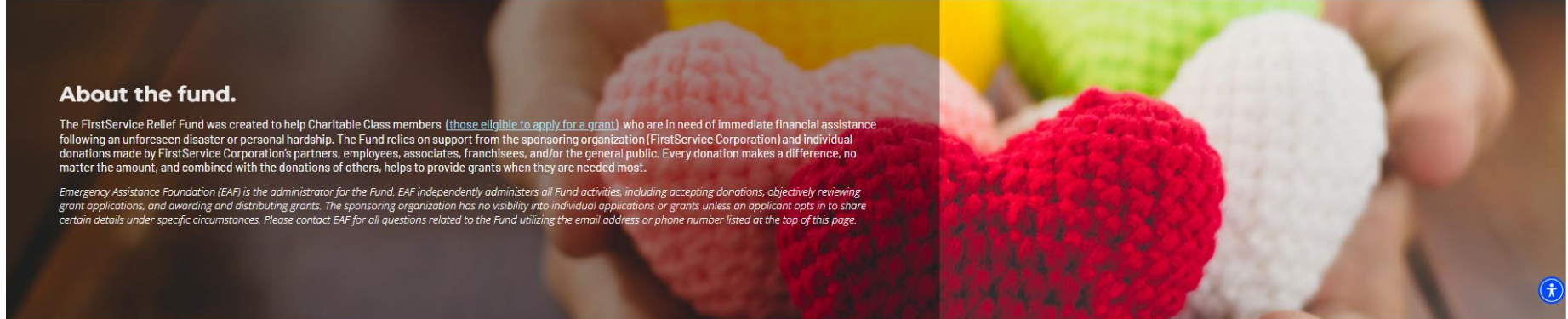


FirstService Relief Fund

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Administered by Emergency Assistance Foundation
firstservicere Relief@emergencyassistancefnd.org | (888) 437-4114





About the fund.

The FirstService Relief Fund was created to help Charitable Class members ([those eligible to apply for a grant](#)) who are in need of immediate financial assistance following an unforeseen disaster or personal hardship. The Fund relies on support from the sponsoring organization (FirstService Corporation) and individual donations made by FirstService Corporation's partners, employees, associates, franchisees, and/or the general public. Every donation makes a difference, no matter the amount, and combined with the donations of others, helps to provide grants when they are needed most.

Emergency Assistance Foundation (EAF) is the administrator for the Fund. EAF independently administers all Fund activities, including accepting donations, objectively reviewing grant applications, and awarding and distributing grants. The sponsoring organization has no visibility into individual applications or grants unless an applicant opts in to share certain details under specific circumstances. Please contact EAF for all questions related to the Fund utilizing the email address or phone number listed at the top of this page.

Make a donation >

Apply for a grant >

Resources >

Application FAQ >

Donation FAQ >

Application help >

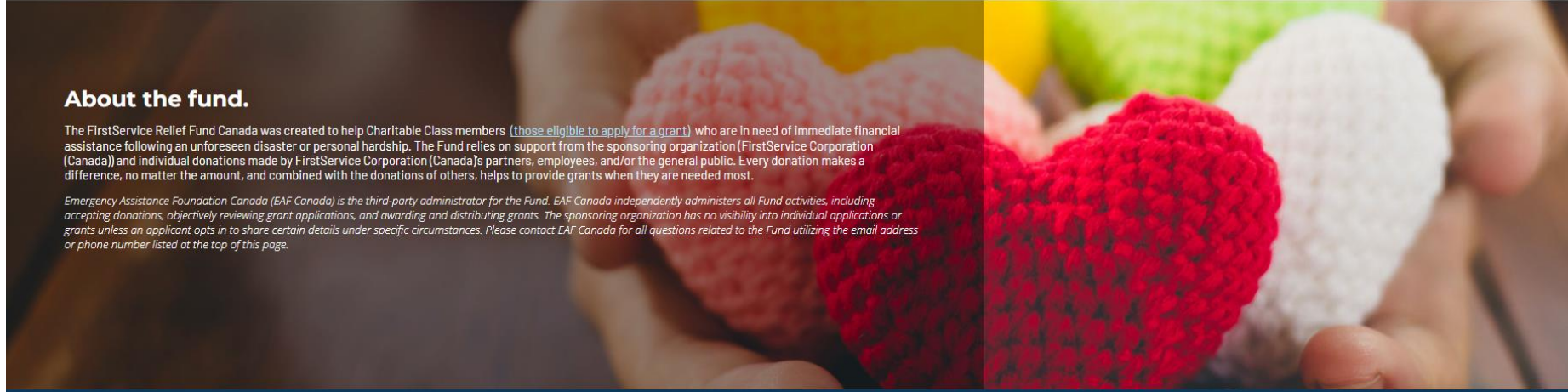


FirstService Relief Fund Canada

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Administered by Emergency Assistance Foundation Canada
FirstService@easrelief.ca | (866) 278-2163





About the fund.

The FirstService Relief Fund Canada was created to help Charitable Class members ([those eligible to apply for a grant](#)) who are in need of immediate financial assistance following an unforeseen disaster or personal hardship. The Fund relies on support from the sponsoring organization (FirstService Corporation (Canada)) and individual donations made by FirstService Corporation (Canada)'s partners, employees, and/or the general public. Every donation makes a difference, no matter the amount, and combined with the donations of others, helps to provide grants when they are needed most.

Emergency Assistance Foundation Canada (EAF Canada) is the third-party administrator for the Fund. EAF Canada independently administers all Fund activities, including accepting donations, objectively reviewing grant applications, and awarding and distributing grants. The sponsoring organization has no visibility into individual applications or grants unless an applicant opts in to share certain details under specific circumstances. Please contact EAF Canada for all questions related to the Fund utilizing the email address or phone number listed at the top of this page.

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FirstService Relief Fund



What is the FirstService Relief Fund?

- ❑ The FirstService Relief Fund was established to help our people during times of natural disasters or personal financial hardship
- ❑ Those who have experienced “Qualified Events” may apply for grants ranging from \$500 - \$3,000 USD
- ❑ Funds awarded are grants, not loans. The grant recipient is not obligated to pay the money back
- ❑ A third-party administrator, Emergency Assistance Foundation (EAF), oversees the Fund and works with applicants to answer any questions they may have
- ❑ The application process is confidential – EAF contacts companies only to verify applicant employment status

FirstService Relief Fund



How it works

- ❑ FirstService Corporation pays all administrative costs to maintain the Fund
- ❑ 100% of individual donations are directed to those who qualify for a grant
- ❑ Eligible team members may apply for grants to help with unforeseen expenses resulting from a wide range of “Qualified Events”
- ❑ Money awarded may be paid directly to vendors including landlords, mortgage companies, medical providers, etc., which is why it’s necessary to provide documentation when applying for a grant



Eligibility criteria

- ❑ On the date of application, an applicant must be an employee, franchisee or employee of a franchisee who is employed, on average, at least 30 hours of service per week, or at least 120 hours of service in a calendar of month
- ❑ If an applicant is on approved medical leave or an approved leave of absence, it has been for no longer than one year
- ❑ The applicant's "Qualified Event" must have occurred within the last 180 days
- ❑ Applicants must establish a financial need and document the expenses for which the grant is being requested (IRS requirement). Payments cannot be made without copies of current bills or invoices so it's important that applicants have these documents



Examples of Qualified Events

- ☐ Serious illness or injury which is not covered by insurance
- ☐ Non-routine/exceptional medical expense not covered by insurance
- ☐ Death of an immediate family member of an employee, franchisee and employee of franchisee
- ☐ Death of an employee (family may apply on behalf of employee)
- ☐ Victim of a violent crime
- ☐ Domestic abuse
- ☐ Natural disaster such as flood, wildfire, tornado, earthquake, tsunami, volcanic eruption, blizzard, drought, cyclone, hurricane, typhoon or severe storm
- ☐ Terrorist actions
- ☐ Disaster resulting from an accident involving a common carrier such as buses, trains, ferry, planes or trucks
- ☐ Military deployment (employees, franchisees and employees of franchisees, spouse or domestic partner called to active duty)
- ☐ Impacts to primary residence such as fire, flood or other unusual life-altering expense not covered by insurance

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Examples of covered expenses

- Food – immediate needs only, usually applicable 2-4 weeks after event
- Clothing – immediate needs only, usually applicable 2-4 weeks after event
- Reasonable evacuation expenses resulting from Event
- Reasonable funeral, burial and travel expenses
- Significant medical expenses
- Prescription medications
- Travel expenses related to the medical care
- Rent: temp housing up to 30 days
- Reasonable repairs to damaged property
- Essential appliances and furnishings
- Essential utilities (gas, water, and electricity)
- Security deposits (for new housing if unable to inhabit existing home)
- Mortgage or rent assistance for primary home
- Adaptive improvements and solutions related to event
- Repairs other than routine maintenance or repairs that were unavoidable
- Cost of public or commercial transportation
- Cost of car rental up to 30 days
- Psychological counseling deemed by a physician to be necessary following an Event
- Expenses resulting from flight from domestic violence such as temporary housing
- Unable to work due to the Event
- Unexpected child care up to 60 days



Examples of expenses that are NOT covered

- Legal fees
- Funeral, travel and burial expenses upon the death of the employee/franchisee/employee of franchisee other than an immediate family member or eligible dependent
- Expenses incurred before the employee, franchisee and employee of franchisee became eligible for assistance
- Lost compensation due to missed time from work
- Electronics and non-essential appliances/furnishings
- Non-essential utilities (internet service, cable television, etc.)
- Personal security items
- Prepaid expenses
- Expenses incurred before the employee, franchisee and employee of a franchisee became eligible for assistance
- Payment for maternity/paternity leave unless medical complications to the mother or child occur
- Routine car maintenance
- Credit card debt
- Pay day loans
- Medical expenses not related to a Qualified Event including: Long-term medical expenses, expenses for elective medical procedures, routine or maintenance medical procedures
- Non-medical insurance co-pays, premiums or deductibles, or items covered by or to be reimbursed by insurance
- School tuition
- Expenses associated with divorce or child custody matters



Defining Eligible Dependents & Immediate Family Members

Who are considered as Eligible Dependents?

The Relief Fund considers the Applicant's spouse/domestic partner, minor children, and others for whom the Applicant is financially responsible as Eligible Dependents.

- The Applicant's parents, grandparents, or other relatives are NOT considered Eligible Dependents, UNLESS the Applicant claims them as a dependent when filing taxes or can provide supporting documentation showing guardianship or financial responsibility (e.g., Power of Attorney).
- A domestic partner is defined as "an ongoing and committed spouse-like relationship between adults of the same or opposite gender."

Who does the Relief Fund consider an Immediate Family Member under a death event?

Applicant may be eligible to receive a grant if they are financially responsible for funeral, burial, and/or travel expenses due to the death of **an immediate family member**.

The Relief Fund defines an eligible immediate family member as any of the following:

- Spouse or partner in a civil union or domestic partnership
- Parent
- Child
- Sibling
- Grandparent
- Grandchild
- Spousal Grandparent
- Father-in-Law or Mother-in-Law
- Brother-in-Law or Sister-in-Law
- Son-in-Law or Daughter-in-Law

FirstService Relief Fund



Donating to the Fund

- ☐ Individuals may opt to make a one-time or recurring donation
- ☐ Automatic payroll deduction is the preferred method of donating to the Fund. No amount is too small – even just \$1 a pay period makes a difference
- ☐ To donate, please visit FirstServiceRelief.com
- ☐ United States employees are also able to donate via text
- ☐ Please visit our Donation FAQs for information on tax deductions

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Documentation Requirements

Because the FirstService Relief Fund is governed by IRS guidelines, applicants are required to show proof of financial of the Event that has impacted them or their eligible dependent (including spouse/ domestic partner), as well as proof of the resulting Expense(s) for which they are seeking assistance.

Here are some common scenarios and the types of documentation that would be accepted:

Serious Illness or Injury and Non-Routine Medical Expense: Acceptable forms of documentation include an emergency responder report, healthcare provider statement, and FMLA/medical leave documentation. These documents must include the event date, patient name, illness/injury description, physician's name and address, and dates of service.

Death: In the case of a death, an obituary, funeral program, or death certificate, which should include the date of death and the description of the relationship to the employee are required.

For a full description of Documentation Requirements please visit:

<https://emergencyassistancefdn.org/wp-content/uploads/2020/12/Supporting-Documentation-Guide.pdf>

FirstService Relief Fund



Helpful Links

Applicant FAQs

U.S.: <https://eafrelieffund.com/f/FirstService/?t=a>

Canada: <https://eafrelieffund.com/f/FirstServiceCA/?t=a>

Supporting Documentation Guide

<https://emergencyassistancefdn.org/wp-content/uploads/2020/12/Supporting-Documentation-Guide.pdf>

Application Guide

https://emergencyassistancefdn.org/wp-content/uploads/2021/10/EAFApplicationGuide_Q.pdf

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How Will You
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