



**Sun Health<sup>®</sup>**

**POLICY: Sun Health Senior Living Employee/Retiree Discount Policy  
Entrance/Membership Fees and Monthly Service Fees**

<i>Original Implementation Date:</i>	1.2015	<i>Date Reviewed/Revised:</i>	1.2017	<i>Area of Responsibility:</i>	Human Resources	<i>Version:</i>	3
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**PURPOSE:** The purpose of this policy is to establish an employee/retiree discount associated with the Senior Living operations. An employee’s spouse is eligible for the discount as described below.

**Monthly Service Fee**

Qualified Sun Health Senior Living (“SHSL”) and Sun Health at Home (“SHAH”) employees and retirees, as well as their spouses, are eligible for a discount for the monthly service fees for both SHSL and SHAH. Employees, retirees and their spouses must meet the program qualification process.

**Discount Amount**

Sun Health at Home Discount:

The SHAH **membership fee and monthly service fee** will be eligible for an employee/retiree discount following the schedule below. The discount below would be in addition to any other discounts applicable to the program.

Sun Health Senior Living Discount:

The SHSL **monthly service fee** will be eligible for an employee/retiree discount following the schedule below. The entrance fee is not eligible for discount.

<u>Years of Service</u>	<u>Discount</u>
5 to 10	2%
11 to 20	4%
> 20 years	6%

In granting the discount, the employee, retiree shall receive disclosure that the discount is provided through interpretation of IRS Regulations that it is not taxable to the respective employee/retiree or spouse. The individual will be encouraged to confer with their personal tax advisor regarding the appropriate tax treatment of the discount value.

To be eligible for the discount, spouses must enter the contracts jointly.

Employees, retirees and their spouses will be responsible for providing proof of years of service when the break in service is longer than 5 years.