

# FirstService Relief Fund

## U.S. Standard Grant Application FAQs



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## HELPFUL DEFINITIONS

**Applicant:** A member of the Charitable Class who is applying for grant assistance. The Applicant's name should always be the employee's name, even if someone else is submitting on their behalf.

**Charitable Class:** A Fund's Charitable Class is the group of individuals who are eligible to apply for a grant per the Fund's criteria. See "Who can apply for a grant from the FirstService Relief Fund?" in the FAQs section for this Fund's Charitable Class.

**Eligible Dependent:** The 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 proof of guardianship/financial responsibility. A domestic partner is defined as "an ongoing and committed spouse-like relationship between adults of the same or opposite gender."

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**Emergency Assistance Foundation (EAF):** EAF is the third-party administrator for the FirstService Relief Fund. EAF independently administers all Fund activities, including accepting donations, objectively reviewing grant applications, and awarding and distributing grants. EAF is a 501(c)(3) tax-exempt, public, non-profit organization.

**Qualified Event:** Eligible Qualified Events are the events included in the Fund's grant criteria that Applicants can apply for. See "What is a Qualified Event" in the FAQs section for this Fund's detailed Charitable Class

**Qualified Expense:** Qualified Expenses are eligible expenses that are part of the Fund's grant criteria and vary by Qualified Event. Applicants can select more than one Qualified Expense as it pertains to the same Qualified Event during the application process.

**Standard Grant:** The Standard Grant is for employees needing significant assistance during times of unexpected financial hardships resulting from a Qualified Event. The application process involves submitting supporting documentation, which is reviewed by EAF as part of determining grant eligibility and grant amount. The grant criteria and eligibility requirements are listed in this FAQ document.

**Immediate Response Program (IRP):** FirstService may decide to launch an Immediate Response Program in the event of a U.S. Presidential Declaration of a major or emergency disaster (or equivalent declaration for events outside of the United States) that impacts multiple employees (e.g., hurricanes, floods).

IRP grants are solely to provide quick and efficient financial assistance to eligible employees and their families with immediate needs – such as for food and clothing – following a U.S. Presidentially Declared major or emergency disaster. **The IRP will consist of a separate application process and a set dollar amount limitation per Applicant.**

*NOTE: If FirstService makes the decision to activate an IRP, the company will send out a communication to employees and a separate FAQ on the IRP grant application process at that time.*

*NOTE: Applying for or receiving an IRP does not disqualify an applicant from applying for or receiving a Relief Fund Standard Grant. Nor does receiving a Standard Grant disqualify an applicant from applying for an IRP grant.*

## FREQUENTLY ASKED QUESTIONS

### ABOUT THE RELIEF FUND & GRANT AWARDS

#### **What is the FirstService Relief Fund / FirstService Relief Fund Canada?**

The Relief Fund – referenced as *FirstService Relief Fund* in the U.S. / *FirstService Relief Fund Canada* in Canada – was created to help Charitable Class members who are in need of immediate financial assistance following an unforeseen disaster or personal hardship.

The Relief Fund relies on support from FirstService and individual donations made by 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 tax-free grants when they are needed most.

- [FirstService Relief Fund](#) disburses assistance grants to those residing in the U.S.
- [FirstService Relief Fund Canada](#) disburses assistance grants to those residing in Canada.

#### **What is a Relief Fund grant?**

A Relief Fund grant is a tax-free financial gift to a Charitable Class member. Relief Fund grant awards are disbursed to eligible Charitable Class members based on financial need of their hardship due to a Qualified Event.

#### **Who can apply for a grant from the Relief Fund?**

The Relief Fund's Charitable Class (those eligible to apply for a grant) includes:

- Employed in the U.S. by FirstService, FirstService subsidiaries and their franchisees, and employees of these franchisees on the date of the application; AND
- Employed on average at least 30 hours of service per week; OR
- Employed on average at least 120 hours of service in a calendar month; OR
- On approved medical leave or an approved leave of absence for no more than one year

#### **Why should I apply for a Relief Fund grant?**

If you are struggling financially to cover expenses brought on by a hardship Qualified Event, a grant award from the Relief Fund can help cover some of those expenses.

#### **When can I apply for a grant?**

You can apply for a Relief Fund grant within 180 days after suffering an impact from a hardship Qualified Event.

#### **How many grants can I receive?**

An Applicant to the FirstService Relief Fund is eligible to receive a maximum of two (2) Standard Grant awards in a rolling 12-month period, starting on the date the first grant was awarded.

*NOTE: Grants from the Immediate Response Program (IRP) do not count against the 2-Standard Grant limit.*

#### **How much is a Relief Fund grant?**

Relief Fund grants are awarded between US \$500 (minimum) and US \$3,000 (maximum). While the application allows for any amount to be requested, final grant amounts will be awarded based on financial need, documentation, and the grant maximum established in the grant criteria.

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### Can I collect and combine several expenses to request a larger grant?

Yes, as long as the expenses are all tied to the same Qualified Event and are designated as a Qualified Expense in the grant criteria. The application allows for several expenses to be selected; however you would need to provide documentation for each. EAF is only able to award for Qualified Expenses that were incurred after the Qualified Event, and the Relief Fund caps grant awards at US \$3,000 maximum.

### Can I apply for two grants at once?

While it is highly uncommon, Applicants can apply for two (2) grants at the same time as long as the applications are for two (2) separate Qualified Events.

*NOTE: Grants from the Immediate Response Program (IRP) grants do not count against the 2-Standard Grant limit.*

### Is there an application fee?

No. There are no application fees for the Applicant.

### How will I receive the grant award?

Best practices are to distribute the grant directly to the vendor whenever possible. However, Emergency Assistance Foundation (EAF) – the third-party administrator of the FirstService Relief Fund – does have regulatory authority to make grants directly to the Charitable Class Applicant.

### Do I have to repay the grant?

No. Because grants from the Relief Fund are not loans, they do not have to be repaid.

### What does tax-free mean?

Tax-free means you will not have to pay taxes on the grant award. Grants from the Relief Fund are considered tax-free for grant recipients according to U.S. IRS tax regulations.

For any questions related to the tax treatment of grants received, please contact a tax professional.

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## ABOUT ELIGIBILITY

### What are the criteria to qualify for a grant from the Relief Fund?

The *FirstService Relief Fund* was designed to provide financial assistance to as many eligible Applicants as possible in accordance with the Relief Fund's criteria and United States tax codes.

Emergency Assistance Foundation (EAF), the Relief Fund's administrator, strives to award grants whenever possible, but there are many factors that determine whether a grant can be awarded.

The most basic criteria include the following:

1. You or your Eligible Dependent (including your spouse/domestic partner) were impacted by one of the Qualified Events included in the chart that follows.
2. Due to the impact of the Qualified Event, you or your Eligible Dependent (including your spouse/domestic partner) incurred one or more of the Qualified Expenses included in the chart that follows.
3. Your application must meet the following conditions:
  - a. You are applying within 180 days after suffering an impact from the Qualified Event.
  - b. You have not been awarded two (2) Standard Grants within a rolling 12-month period.
  - c. You are not reapplying within 30 days of a rejected application (grant was not approved/awarded)
4. U.S. tax regulations require us to ask for proof of the Qualified Event that has impacted you or your Eligible Dependent (including your spouse/domestic partner), as well as proof of the

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resulting Qualified Expense(s) for which you are seeking assistance. You must be able to provide the required supporting documentation, which is current and should be dated within 60 days of submitting the application for any invoices. Please review our Supporting Documentation Guide at [eafrelief.org/appresourcedocs](http://eafrelief.org/appresourcedocs) for detailed information.

### Do I have to contribute to the Relief Fund to be eligible to apply for a grant?

No. Donating to the Relief Fund is completely voluntary, and eligibility for assistance is based upon need and qualifying circumstances. In addition, no Applicant is entitled to receive a grant based on their history of contributions to the Relief Fund.

### What is a Qualified Event? A Qualified Expense?

The following chart shows all of the Relief Fund's [Qualified Events and Qualified Expenses](#). Qualified Expenses are dependent upon the Qualified Event. A checkmark indicates which Events and associated Expenses are Qualified.

**IMPORTANT: Grants are not available for Qualified Events and Qualified Expenses that are not marked in the following chart.**

		QUALIFIED EXPENSES THAT ARE COVERED BY GRANTS																				
		IMMEDIATE NEEDS		MEDICAL		HOUSING *				TRANSPORTATION		MISC.										
		Food – immediate needs only (usually applicable up to 2-4 weeks after the Event)	Clothing – immediate needs only (usually applicable up to 2-4 weeks after the Event)	Reasonable evacuation expenses resulting from an Event	Reasonable funeral, travel and burial expenses	Significant medical expenses	Prescription medications	Travel expenses related to the medical care	Rent: temporary 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 residence	Adaptive improvements and solutions related to the Event	Repairs other than routine maintenance, or repairs that could not have been a voided	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, etc.	Unable to work due to the event	Unexpected child care up to 60 days
QUALIFIED EVENTS THAT ARE COVERED BY GRANTS	Natural disaster such as flood, wildfire, tornado, earthquake, tsunami, volcanic eruption, blizzard, drought, cyclone, hurricane, typhoon or severe storms.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Terrorist actions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Disaster resulting from an accident involving a common carrier such as buses, trains, ferry, planes or trucks	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Military Deployment (employee, spouse or domestic partner called to active duty)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Impacts primary residence: fire, flood or unusual life-altering expense not paid by insurance	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Serious illness or injury	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Non-routine/exceptional medical expense	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Victim of a violent crime	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Domestic abuse	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Death of employee or their immediate family member	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

### What expenses are NOT covered by the Relief Fund?

Examples of existing non-qualified expenses include:

- Expenses incurred before the employee, franchisee and employee of a franchisee became eligible for assistance
- Legal fees
- 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
- Payment for maternity/paternity leave unless medical complications to the mother or child occur

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- 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
- Funeral, travel and burial expenses upon the death of the employee/franchisee/independent affiliate's relative other than an immediate family member or Eligible Dependent

### 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?

An 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/parent-in-law/step-parent
- Child/child-in-law/step-child
- Sibling/sibling-in-law/step-sibling
- Grandparent/grandparent-in-law/step-grandparent
- Grandchild/grandchild-in-law/step-grandchild

\*A domestic partnership is defined as "an on-going and committed spouse-like relationship between adults."

### What does "Unable to Work due to the Event" mean?

An Applicant is considered "Unable to Work due to the Qualified Event" after five (5) or more consecutive days of work are missed due to the impact of the Qualified Event.

### I borrowed money from my family and/or friends due to an unforeseen disaster or personal hardship. Will the Relief Fund reimburse me so that I can pay them back?

No. Grants from the Relief Fund are only available for those in need of immediate financial assistance who do not have any other financial resources available to them.

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### ABOUT THE APPLICATION & REVIEW PROCESS

#### How do I apply for a grant from the FirstService Relief Fund?

To apply for a grant, go to [firstservicerelief.com](http://firstservicerelief.com) and click on the red "Apply for Grant" button.

The first time you access the online grant application platform, you must register by entering your first name, last name, and email address. After submitting the registration form, you will receive a link to the application via email. You can use this link to return to your application at any time.

*TIP: Be sure to look for emails in any filtered inboxes and spam or junk folders.*

After completing your application, including providing all required supporting documentation, submit the application for review.

Please review our Grant Application Guide at [eafrelief.org/appresourcedocs](http://eafrelief.org/appresourcedocs) for step-by-step grant application instructions.

#### How long do I have to submit a grant application once I start the process? Is there a time limit?

There is no time limit to fill out and submit the application. The application does not time out, so you can save the form and pick up the application at a later time. **However, the EAF Review Team will not begin reviewing your application UNTIL the application is completed by hitting the "Submit" button at the end.**

Once submitted, EAF does not close out an application unless there has been at least 45 days of no response from the Applicant. Throughout the process, Applicants will receive several emails from EAF. EAF will also send a 15-day expiration email to prior to voiding the application from the system.

#### Do I need to submit my application in one sitting?

No. But you need to submit the application within 180 days of suffering an impact from the Qualified Event.

Once you start the application, you can save it and return to it to upload/provide supporting documentation as needed. **However, the EAF Review Team will not begin reviewing your application UNTIL the application is completed by hitting the "Submit" button at the end.**

*NOTE: Once an application is submitted, you have the opportunity to provide any additional documentation directly to your EAF reviewer.*

#### How does the grant review, award, and payment process work?

Grant applications are independently and objectively reviewed by Emergency Assistance Foundation (EAF), the Relief Fund's third-party administrator.

**INITIAL REVIEW:** Once your application is submitted and received by EAF, one of our objective Reviewers will be assigned to review your application. If any additional information or supporting documentation is needed, they will let you know.

Your application will remain in Initial Review until all supporting documentation is received and the application is complete. This stage normally takes 7-10 business days but, depending on the Applicant's response time and the information/documentation, timing can vary.

**QUALITY CHECK:** After the initial review process is complete, your application will enter the final stage of review, in which a second Reviewer completes a final quality check. This stage normally takes 2-3 business days unless there is a need for additional clarification.

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**AWARD NOTIFICATION & PAYMENT PROCESS:** You will be notified by email if your grant is awarded or not awarded.

*TIP: Make sure to whitelist EAF (@emergencyassistancefdn.org) and check filtered inboxes, spam or junk folders.*

If you are awarded a grant, the email you receive will include all of the important details related to the grant amount and payment information/instructions.

### **How long does it take to receive payment once a grant is awarded?**

The processing of grant payments normally takes up to two (2) weeks AFTER all supporting documentation is received. Please note that this time estimate assumes there are sufficient assets to make the grant payment.

Please review our Grant Payment Guides at [eafrelief.org/appresourcedocs](http://eafrelief.org/appresourcedocs) for additional detail.

### **When I apply for a grant, will my personal information remain confidential?**

Yes. Your personal information is only used to determine your grant eligibility and the grant amount unless you as the Applicant opt in to share additional details with the Relief Fund's sponsoring organization (FirstService) under certain circumstances.

Once an application is submitted, an email will be sent to the HR Department at the Applicant's employer with the Applicant's name, employee ID number, email address, and which company they work for to verify the Applicant is part of the Charitable Class.

Grant applications are independently and objectively reviewed by Emergency Assistance Foundation (EAF), the Fund's third-party administrator, and will be treated confidentially. However, non-identifying aggregated statistical information will be reported to the Fund's sponsoring organization (FirstService) on a periodic basis in an effort to improve the Fund.

### **Can I apply for a grant on behalf of someone else?**

Unless the Charitable Class member is incapacitated or deceased, and you are their family member you cannot apply for a grant on their behalf. If you think an eligible Charitable Class member would benefit from a grant, please share information about the Relief Fund with them.

### **What happens if my grant application is not approved?**

If your previous application was not approved for a grant award, there will be a 30-day waiting period to apply for a different Qualified Event. **You cannot reapply for the same Qualified Event that was not approved.**

As the Applicant, you will receive an email from the EAF Reviewer notifying why you did not receive a grant. However, if there is new information/documentation on a previous application, you can contact EAF's Applicant Support Team to discuss options.

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## FOR ADDITIONAL SUPPORT

### **How do I contact Applicant Support?**

The EAF Applicant Support team for the FirstService Relief Fund can be reached via email [firstservicerelief@emergencyassistancefdn.org](mailto:firstservicerelief@emergencyassistancefdn.org) or by phone at **1-888-497-4114**.

Please visit the Relief Fund's webpage ([www.firstservicerelief.com](http://www.firstservicerelief.com)) for additional contact options.



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## Where can I find additional resources?

Visit [eafrelief.org/appresourcedocs](https://eafrelief.org/appresourcedocs) for helpful grant application resources and documents.

Visit [eafresources.org](https://eafresources.org) for links to local resources, disaster preparedness education, financial learning tools, and more.