

# Program Guidelines

## Overview

Sunrun provides an Adoption & Surrogacy Assistance Program to enable an equitable path to parenthood for all Sunrunners. The program provides a one-time maximum reimbursement of up to \$25,000 toward eligible adoption and/or surrogacy expenses.

## General Guidelines

The intent of this program is to enable eligible Sunrunners to welcome an eligible child into their family. Ineligible adoptions include, but are not limited, to:

- Stepchild
- Child of your domestic partner
- Child of any member of your (employee) household
- Child of blood relation

## Adoption Agency Requirements

A bona fide adoption agency is an established commercial organization or agency that provides adoption services and that has a valid business license that adheres to federal, state or local laws.

## Surrogacy Contract Requirements

A fully completed surrogacy contract is one that results in you being recognized as the parent of a child on a birth certificate, court order of adoption and/or post-birth court order recognizing your parental rights under applicable law and does not violate any federal, state or local laws.

A bona fide surrogacy agency is an established U.S. commercial agency or organization that provides surrogacy services and that has a valid business license that adheres to federal, state or local laws. Examples of surrogacy services include, but are not limited to consultation,

screening and matching process through to the delivery of a child and return-to-home plans.

## Eligibility

Eligible employees include all full-time, regular benefits-eligible employees (working 30 or more hours per week), regardless of marital status, with 12 months of consecutive service at the time of the adoption and/or surrogacy birth event who:

- Have met local and/or state legal requirements to adopt;
- Are legally adopting a child under 18 years of age (or over 18 years of age if they are incapable of self-support because of a mental or physical disability that existed before age 18); and
- Are actively employed with Sunrun Inc. when the reimbursement is made.

This policy is applicable to legal and finalized adoption and/or surrogacy arrangements on or after January 1, 2023. Employees who recently welcomed a child via adoption and/or surrogacy into their family before January 1, 2023, are not eligible. Employees must submit all documentation for reimbursement no later than 12 months following the date of the final adoption process or birth of the baby via surrogate.

**Note:** To receive any reimbursement, your parenting rights must be finalized and legally recognized under applicable U.S. local, state and/or any other laws **on or after** January 1, 2023. Since state laws vary, the documentation of your parenting rights may vary by state. Examples include, but are not limited to, the child's birth certificate listing you as the parent, a court order of adoption or post-birth order establishing your parental rights. If your parental rights were recognized under applicable state

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law **before** January 1, 2023, the expenses associated with a legal adoption and/or surrogacy arrangement that resulted in the child becoming a member of your family before January 1, 2023, are not eligible for reimbursement.

## Maximum Lifetime Reimbursement Amount

Effective January 1, 2023, Sunrun Inc. will reimburse you one time up to a maximum of \$25,000 for expenses incurred related to a legal and finalized adoption and/or birth of a baby via surrogate. You may be reimbursed for qualifying expenses that are related to and incurred by you pursuant to a fully completed and lawful surrogacy contract after the birth of a baby via surrogate and/or after the adoption process is fully completed, according to the local regulations.

Of the \$25,000 lifetime maximum benefit, up to \$5,000 can be applied for eligible expenses submitted related to the costs of travel fees associated with the adoption or surrogacy within the U.S., such as domestic flights, tickets, hotel and gas.

**Note:** If your spouse/domestic partner works at Sunrun Inc., only one of you is eligible to submit expenses and receive reimbursement (not to exceed the one-time maximum benefit of up to \$25,000 related to the adoption and/or birth via surrogate).

## Taxation & Legal Advice

Sunrun Inc. will report the reimbursement that you receive as taxable income on your W-2. Laws associated with adoption and/or surrogacy are complex. Please consult your legal advisor when commencing adoption and/or surrogacy arrangements. Please consult with your personal tax advisor for assistance on your

personal tax returns to determine whether you should make an adjustment to your income tax withholding.

## Eligible Expenses

### Adoption

Receipts are required and must be submitted as a single reimbursement request after the adoption and/or surrogacy process is legally finalized and the child is placed in your home. Examples of eligible adoption expenses include, but are not limited to:

- Adoption fees from a U.S. bona fide adoption agency
- U.S. legal fees resulting from the adoption process
- U.S. court costs and attorney fees
- U.S. adoption agency fees
- Qualified travel fees associated with surrogacy within the U.S. (up to \$5,000 maximum reimbursement)

### Surrogacy

Receipts are required and must be submitted as a single reimbursement request after the adoption and/or surrogacy process is legally finalized and the child is placed in your home.

Sunrun recognizes that the medical and non-medical expenses associated with surrogacy can be substantial. **This program provides for the potential reimbursement of non-medical expenses only.** The non-medical expenses must be payable by you under the terms of a legal adoption and/or surrogacy contract and detailed documentation of the nature of the expense and your payment of the expense must be provided.

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Examples of non-medical expenses that are eligible for reimbursement include, but are not limited to:

- Surrogate agency administrative fees associated with the costs of locating and interviewing a surrogate
- Surrogacy agency administrative fees for managing the surrogacy
- Legal fees incurred by you for review and negotiation of the surrogacy contract. An itemized billing from legal counsel is required
- Legal fees incurred by you in connection with acquiring legal parentage rights, including expenses associated with obtaining a pre-birth order or adoption, if needed. An itemized billing from legal counsel is required if this fee is not included in the surrogacy contract
- Qualified travel fees associated with surrogacy within the U.S. (up to \$5,000 maximum reimbursement)

## Ineligible Expenses

Non-qualifying expenses include any medical expense and any expense that is either not lawful or not payable under the terms of the adoption and/or surrogacy contract. Expenses paid directly to the surrogate are never reimbursable. Medical expenses for services associated with the surrogate or to egg and sperm donors are not eligible for reimbursement. The following expenses are also not eligible for reimbursement:

- Sunrun employees, their spouses/domestic partners or their children who are acting as a surrogate are not eligible to receive reimbursements of their expenses under this program

- The fee charged by the surrogate for acting as a surrogate which is charged to you under the surrogacy contract
- Any food, clothing and/or shelter expenses of the surrogate that may be charged to you under the surrogacy contract
- Expenses which are not incurred pursuant to a surrogacy contract (other than certain legal expenses) that is valid under state law
  - Example 1: You arrange for someone to act as a surrogate and you do not enter into a surrogacy contract with that individual. No expenses associated with this surrogacy arrangement are eligible for reimbursement.
  - Example 2: You reside in a state in which a surrogacy contract is against public policy and is void. No surrogacy-related expenses are reimbursable. Currently, Louisiana, Michigan and Nebraska do not consider compensated surrogacy arrangements legal. No surrogacy expenses are eligible for reimbursement if you live in those states.
- All expenses related to the legal adoption and/or surrogacy arrangements outside of the 50 U.S. states and D.C.
- Medical and hospital expenses incurred by the surrogate, even if these expenses are charged to you under the surrogacy contract
  - Examples of medical expenses that are not eligible for reimbursement include, but are not limited to: prenatal vitamins; prescription drugs (including hormones and fertility drugs); pregnancy tests; genetic testing of the surrogate or child; prenatal doctor visits, consultations or other medical expenses; delivery expenses and hospital expenses for delivery or complications associated with delivery; screenings; testing; evaluations; drugs; retrieval; storage;

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insemination; in-vitro fertilization (IVF) and postnatal care (some or all of these may be covered under the surrogate mother's medical plan or your medical plan, depending on the service being provided)

- Medical expenses for services provided to third parties such as egg and sperm donors
- Medical expenses and/or costs related to embryo donors, embryo donations and/or embryo adoptions
- Medical expenses of a newborn child
- Short-term disability (STD), STD insurance expenses incurred by the surrogate or the surrogate agency and wage-replacement expenses, even if these expenses are charged to you under the surrogacy contract
- Expenses that are reimbursed to you by a third party. For example, reimbursement of legal fees is not available if you are enrolled in a legal services plan and that legal services plan pays or reimburses the legal fees and expenses
- Expenses incurred pursuant to a legal adoption and/or surrogacy contract that is not fully completed. For example, if you agree to a legal adoption and/or surrogacy contract and incur expenses but are unable to complete the adoption and/or agree upon an appropriate surrogate and discontinue the adoption/surrogacy process, your expenses are not eligible for reimbursement
- Your personal expenses. For example, if you travel to meet with a surrogate, your personal expenses associated with that travel are not eligible for reimbursement
- Expenses already paid for or reimbursed by another employer, benefits program or a third party, including expenses paid by or reimbursed under any federal, local or state program

- Travel expenses for siblings, relatives or friends in relation to adoption and/or surrogacy
- Home remodeling, special accommodations, food and/or clothing expenses for the child

## Submitting a Claim for Reimbursement

You are required to submit all documentation in a single submission. You must submit all documentation **within 12 months** immediately following the date of birth and/or the date in which you assumed legal parental rights. The qualifying documentation must be related to and incurred by you pursuant to a fully completed and lawful surrogacy contract after the birth of a baby via surrogate and/or after the adoption process is fully completed according to local or state regulations.

To receive reimbursement, you must submit the following documentation:

- A completed and signed Adoption & Surrogacy Assistance Program Reimbursement Form. You may find the form by visiting the [Adoption & Surrogacy Program page on the Sunrun Benefits Website](#).
- Copies of all relevant, paid receipts for which the reimbursement is requested; unpaid invoices will not be reimbursed
- Copies of all court and/or legal documents establishing your parental rights. Your name must appear as a parent on any court and/or legal documents

All eligible receipts and reimbursement forms must be submitted in its entirety as a single submission. Individual reimbursement requests or receipts will not be considered or reimbursed.

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## Submission Instructions

1. Organize receipts and legal documentation into two distinct PDF documents: one PDF document for travel-related paid receipts (up to \$5,000) only and a second PDF for all non-travel, court and/or legal-related paid receipts and copy of documents establishing parental rights.
2. Complete and submit the [Adoption & Surrogacy Assistance Program Reimbursement Google Form](#). Attach all PDF documents with this single submission.
3. Once submitted, please allow up to 10 business days for the review of your submission. You may receive follow-up questions via email for clarifications during this review period.
4. Once submitted, you will typically be reimbursed within two to three pay periods after your claim has been fully approved. Any claim approved after November 30 will be reimbursed in January of the following year.

## Enrolling Your Child in Benefits

Once you obtain legal custody or parental rights, you may add your child to your medical, dental and/or visions plan(s) in Workday **within 31 days** of the adoption or birth.

In addition, consider adding them as a beneficiary to your life insurance policy and 401(k), enrolling them in voluntary child life insurance or increasing your own voluntary life and accidental death and dismemberment benefit. Finally, consider increasing your pre-tax contributions to your health savings account (HSA, if applicable) and opening a dependent flexible spending account (FSA) to pay for dependent care expenses.

Your new selections will become effective on the date of your child's placement. If you do not enroll your child within 31 days of your child's

placement, you will not be able to enroll them until the next Open Enrollment period.

## Important Contacts

Contact the Benefits Advocate Center at (844) 632-2197, Monday through Friday, from 7 a.m. to 5:30 p.m. Pacific Time, or email [champion@hubinternational.com](mailto:champion@hubinternational.com). For additional information, please visit the [Adoption and Surrogacy Assistance Overview page on the Sunrun Benefits Website](#).

*The Adoption & Surrogacy Assistance program provided by Sunrun Inc. is subject to local and state laws and regulations. In the event of any conflict between a provision of this guideline and a provision of laws and regulations, the applicable provision of laws and regulations should prevail. The Adoption & Surrogacy Assistance Program is separate and independent from all Sunrun Inc. health and welfare plans. It is also not an ERISA plan. Additional documentation and certification may be required for verification purposes.*

*Reimbursements under this program are payable only to eligible employees. The right to reimbursement cannot be transferred or assigned, in whole or in part, either directly or by operation of law or otherwise. Benefits are payable solely from the general assets of Sunrun Inc. Sunrun reserves the right to make changes or eliminate this program at any time and for any reason.*

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