



EMPLOYEE REMINDER

GRADUATE TAX EXEMPTION REQUEST FORM

Due to the cap the IRS has on tax-free graduate assistance, every employee needs to complete the Graduate Tax Exemption Request Form when signing up for graduate courses.
(This form does not pertain to spouse or children.)

The Graduate Tax Exemption Form is below:

<https://oilernation.findlay.edu/Offices/humanresources/SiteAssets/Pages/Employee-Resources/GraduateCourseTaxExempt%20Form.pdf>

All Graduate Tax Exemption Request Forms require a supervisor signature and must be received by the Director of Human Resources prior to the beginning of classes in order for the form to be considered valid.

The Office of Human Resources will track the amount of tuition remission awarded for graduate courses. The Graduate Tax Exemption Request Form will be important in determining if the employee should be taxed on any aid over the \$5,250 cap during the calendar year. If the form is not received in a timely manner or not approved, you will be taxed on the aid over the limit.

As an employee, the tax on graduate courses for your spouse and children will be waived up to \$5,250 during the calendar year. Once the cap has been reached, the employee will be taxed for aid over the limit.

In essence what this means to you as an employee is that the tax on graduate level courses for you, your spouse, and children will be waived up to \$5,250 during the calendar year. Once the cap has been reached for a calendar year, the University will look to the tax exempt form to determine taxability on the amount over \$5,250 for you; and will automatically tax you for the overage of your spouse and children.

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