

## Farris Heritage Trust - Educational Assistance Program

---

### Purpose

The Farris Heritage Trust encourages educational achievement among descendants of the Grantor, Ronald Lafe Farris.

This program reimburses qualified educational expenses for eligible beneficiaries.

---

### Eligible Programs

Educational assistance may be available for:

- Undergraduate university programs
  - Graduate degree programs
  - Accredited vocational or trade schools
  - Professional certification programs
  - Apprenticeships
- 

### Lifetime Benefit Limits

Subject to Trust provisions:

#### Undergraduate Study

Up to **130 credit hours** of tuition reimbursement.

#### Graduate Study

Up to **40 credit hours** of tuition reimbursement.

#### Vocational or Trade Programs

Up to **\$5,000 per program**.

---

### Age Limits

Undergraduate reimbursement available until age **30**.

Graduate reimbursement available until age **45**.

The semester in which the beneficiary reaches the age limit remains eligible.

---

### Payer of Last Resort

The Trust operates as a **payer of last resort**.

Before Trust reimbursement is considered, the following must be applied:

- Scholarships
- Grants
- Fellowships
- Employer education programs
- Veterans benefits
- Government assistance
- 529 plans or education savings accounts
- Loans or family contributions

The Trust reimburses **only the remaining unpaid balance**.

---

### **Required Documentation**

Applicants must submit:

- Institutional billing statement
  - Proof of scholarships or other aid
  - Enrollment verification or transcript
  - Documentation of grades
  - Claim worksheet summarizing the unpaid balance
- 

### **Payment Method**

Payments are normally **reimbursements to the claimant after verification**.

At the Trustee's discretion, payment may be made directly to the institution.

---

### **Important Conditions**

- Courses must be completed with a **passing grade**
  - Failed or withdrawn courses are not eligible
  - Claims must be filed within the annual claim window
- 

### **Application**

Claims must be submitted using the **Farris Heritage Trust Beneficiary Claim Form** during the annual filing period.

---