



BOEING EDUCATIONAL PROGRAMS TAX FORM

(Please attach to Boeing Enrollment Form)

SECTION A: TO BE COMPLETED BY THE EMPLOYEE (Please Print or Type)

NAME	BEMSID	BUDGET/DEPT	MAIL CODE
BUSINESS PHONE	PAY CODE	JOB TITLE	
<input type="checkbox"/> GRADUATE DEGREE SOUGHT: _____			
<input type="checkbox"/> UNDERGRADUATE DEGREE/CERTIFICATE _____			
<input type="checkbox"/> INDIVIDUAL COURSE(S): _____			

SECTION B: TO BE COMPLETED BY THE MANAGER and EMPLOYEE REFERENCE IRS PUBLICATION 508

1. Is the education needed to meet the minimum educational requirements of the employee's trade or business?

YES If "YES" subject to reporting and withholding.
 NO
2. Is the education part of a study program that can qualify the employee for a new trade or business?
 Note: a change of duties does not constitute a new trade or business if the new duties involve the same general type of work involved in an employee's current employment.

YES If "YES" subject to reporting and withholding.
 NO If "NO" please be prepared to explain and support how this education relates to the employee's present job.

If the answer to box 1 or 2 is YES, do not answer questions 3 and 4. The employee's educational expenses are taxable and are subject to withholding of taxes.

3. Is the education required to keep the employee's present salary, status, or job?

YES The employee's educational expenses are not taxable or subject to reporting. Please be prepared to explain and support how this education is required to keep the employee's present salary, status, or job.
 NO
4. Does the education maintain or improve skills needed in the employee's current job?

YES The employee's educational expenses are not taxable or subject to reporting. Please be prepared to explain and support how this education relates to the employee's present job.
 NO

The Company relies upon your true and accurate responses to the above questions in order to comply with the applicable legal requirements under federal tax laws. Any misrepresentation and/or false statements by an employee or manager may result in disciplinary action, up to and including discharge, and/or criminal penalties. The Boeing Company is not liable for taxes or fines imposed by the IRS, now or in the future.

X _____ DATE

EMPLOYEE SIGNATURE

X _____ DATE

MANAGER NAME (PLEASE PRINT) MANAGER SIGNATURE

SECTION C: TO BE COMPLETED BY THE APPLICABLE BOEING LEARNING TOGETHER PROGRAM OFFICE

Learning Together Program Administrator _____ Date _____ TAXABLE EXEMPT

PLEASE RETURN THIS FORM TO YOUR BOEING LEARNING TOGETHER PROGRAM REGIONAL OFFICE