

Ross International Alumni Club Expense Reimbursement Checklist

Ensure your event spending adheres to the University of Michigan's maximum per person event costs* (in U.S. dollars). The per-person maximums are:

- **Breakfast, brunch, lunch and happy hour events:** \$25 U.S. maximum per person
- **Dinner events:** \$55 U.S. maximum per person
- **Alcohol spending:** \$20 U.S. maximum per person (in addition to food costs)
 - *These limits include any tips and taxes paid, but do not include other service/management fees or room rental rates.
 - For example, if your club is hosting a networking lunch, it may spend no more than \$45 U.S. per person—up to \$20 U.S. on alcohol and up to \$25 U.S. on lunch.
- Adherence to this strict policy is calculated by the University of Michigan's auditing department using the event's total food and beverages costs and the total number of guests.
- **U of M will not reimburse you for food/drink payments in excess of the set per person maximum amounts.**

Download the compressed file *International Clubs Reimbursement Forms.zip* from rossclubresources.com or your original club budget email. There should be **six** files compressed inside.

You only need to complete some parts of the attached forms. In the *Clubs- International Reimbursement Guidance Package.pdf*, I have highlighted in **pink** the specific sections of each document you must fill out. Use this as a guide when you complete each file. **Leave un-highlighted sections blank.**

Email completed reimbursement documentation to MiRossAlumniClubs@umich.edu. Reimbursements typically take 2 - 3 weeks to process. **U of M will only reimburse individuals,** not companies or organizations.

If you are a non-U.S. citizen, please complete and submit together:

- Excel spreadsheet: Reimbursement Payment Guide to Individual (Foreigner).xlsx
 - Reimbursee & Event Info Sheet tab (including full list of event attendees)
 - Itemized Costs Summary tab
 - Wire Request Form tab
- *Alien Certificate (U of M Payroll Office)
- *Form W-8BEN-E
- Please scan and send receipts of all alumni club expenses (***translated to English***)

If you are a U.S. citizen, please complete and submit together:

- Excel spreadsheet: Reimbursement Payment Guide to Individual (Foreigner).xlsx
 - Reimbursee & Event Info Sheet tab (including full list of event attendees)
 - Itemized Costs Summary tab
 - Wire Request Form tab
- *Form W9
- Scan and send receipts of all alumni club expenses (***translated to English***)

- **We encourage you to email separately, or call the Office of Alumni Relations (+1-734-647-3979) to provide, your social security number, tax identification number, or other sensitive information these forms require.*
- **In filling out the forms, you will not be charged any taxes; the U.S. IRS simply requires U of M to have them on file.*
- **Once you have filed the asterisked (*) forms with the University of Michigan, you do not have to complete them again for future reimbursement requests unless your information changes.*