

## **UWSA Member benefit: Legal and Financial advisor reimbursement in the event of involuntary termination**

In addition to the advice and counsel of the UWSA Executive Manager, the UWSA provides financial support to members who have been involuntarily terminated<sup>1</sup>. In these circumstances, the UWSA will reimburse the member for:

- \$500<sup>2</sup> towards legal fees to assist the member in seeking independent legal advice on the situation; and
- \$100<sup>2</sup> toward accounting/financial advisor fees in seeking advice on the disposition of any termination lump-sum payments; pension arrangements or other financial matters resulting from the termination.

In general this benefit does not apply to normal retirements or to termination of Contingent on Funding Staff resulting from loss of funding. However, members in these situations are encouraged to consult with the UWSA Executive Manager to discuss extenuating circumstances which might make the benefit applicable<sup>3</sup>.

Generally, the process of using the benefit is:

1. The member consults with the UWSA Executive Manager to confirm applicability.
2. The member engages the external advisor(s) and pays their invoice(s). Negotiating fees and advisor payment arrangements is not part of the UWSA responsibility.
3. The member submits the advisor's invoice (copy), marked "paid", to the UWSA Executive Manager who will then arrange for reimbursement up to the maxima noted above. Any fees incurred in excess of the noted maxima are the responsibility of the member.

Please note that the UWSA does not provide recommendations on legal or financial advisors. It is up to each individual member to select their own advisors. However, in particular for legal advisors, the UWSA Executive Manager can provide guidelines on the basic qualifications and experience that an advisor should have, and provide information about the UW Policy framework in which the termination has occurred. Ultimately, however, members must make their own choices.

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<sup>1</sup> Involuntary termination, as defined by [Policy 18](#): termination due to organizational change; termination for performance; termination for other reasons.

<sup>2</sup> Or such amount as determined from time to time by the UWSA Board and subject to budget constraints

<sup>3</sup> For example, if an "early retirement" package is being offered in place of a termination. For Contingent on Funding staff who are terminated, the UWSA Executive Manager can review policy entitlements for specific situations.