



Buying Club / Retail Membership — Business Expense Exception Request

Purpose: Use this form to request pre-approval for a buying club or retail membership (e.g., BJ’s Wholesale Club, Costco, Sam’s Club, Instacart+) as a Dartmouth business expense. Memberships of this type are generally not reimbursable under the Business Expense Policy unless a specific exception is granted. Complete all sections and obtain the required approval signature before submitting with your expense report.

Important: If the membership’s primary purpose is to benefit Dartmouth—not the individual employee—there are generally no personal tax implications for the employee.

SECTION 1 — Department & Requestor Information

Department / Program:	Date of Request:
Requestor Name:	Requestor Title:
Chart string:	

SECTION 2 — Membership Details

Membership / Club Name:	Annual Membership Cost:	Renewal Date (if known):
Membership Card Holder(s):		

SECTION 3 — Business Justification

Describe the clear business benefit to Dartmouth: *What supplies or goods will be purchased? How does this membership support Dartmouth’s operational needs? What are the cost advantages of the membership?*

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SECTION 4 — Requestor Certifications

By signing below, the requestor certifies that:

- This membership will be used exclusively (or near-exclusively) for Dartmouth institutional purchases.
- Membership card(s) will be held and controlled by the individual(s) identified in Section 2, who are responsible for ensuring the card is not used for personal purchases.
- All information provided in this form is accurate and complete.
- The department understands that misuse of this membership for personal benefit may result in repayment or tax obligations.

Requestor Signature:	Printed Name & Title:	Date:

SECTION 5 — Required Pre-Approval Signature

Per the Business Expense Policy, buying club memberships require approval from one of the following roles: **Dean, Vice President, Provost, President, or Board of Trustees member.** *Approval cannot be granted at the department head level.*

Approver Signature:	Approver Name & Title/Role:	Date Approved:

After approval is obtained, submit request through the [General Request eForm](#), Request type: “General Question Other” to ensure proper tax review and reporting.