

DECLARATION OF FINANCIAL INTERDEPENDENCE

We, the undersigned domestic partners, are financially interdependent. We submit the following two items of proof evidencing our financial interdependence:

- We have a joint bank account.
- We have a joint credit card.
- We are joint obligors on a loan.
- We jointly own our residence.
- We jointly appear as tenants on the lease for our residence.
- We keep a common household (household expenses, e.g., utility bills, telephone bills, joint public assistance budget, etc.)
- We jointly own a motor vehicle.
- We have executed wills naming each other as executor and/or beneficiary.
- We have granted each other durable powers of attorney.
- We have conferred upon each other authority to make health care decisions (e.g., health care power of attorney).
- At least one of us has designated the other as a beneficiary under a retirement benefits account.

_____ Other item of proof as is sufficient to establish economic interdependency under the circumstances of the particular case (specify).

Print Name

Print Name

Signature

Signature

Sworn to before me this
day of _____, 200

NOTARY PUBLIC

ATTACHMENT I

EXAMPLES OF ITEMS OF PROOF FOR THE DECLARATION OF FINANCIAL INTERDEPENDENCE

Listed below are examples of items of proof that may be acceptable attachments to a Declaration of Financial Interdependence. Other items of proof may also be acceptable. You must provide an original plus a photocopy of all items of proof. The original documents will be returned to you. NOTE All determinations of whether a particular item of proof is acceptable to prove financial interdependence shall be made by the Plan Administrator, in its sole and absolute discretion.

JOINT BANK ACCOUNT

- Statement with both names
- Check with both names
- Passbook with both names

JOINT CREDIT CARD

- Statement with both names

JOINT OBLIGORS ON LOAN

- Note or other loan origination document with both names

JOINT OWNERSHIP OF RESIDENCE

- Deed or other sale/transfer document with both names
- Property or water tax document with both names

JOINT TENANTS ON LEASE

- Lease with both names

COMMON HOUSEHOLD EXPENSES

- Utility/telephone bill with both names
- Public assistance document with both names

JOINT VEHICLE OWNERSHIP

- Title in both names

JOINT WILLS

- Copy of will or wills, with each party naming the other as beneficiary and/or executor

POWER OF ATTORNEY

- Copy of Powers of Attorney with each party naming the other party and no limitation on the term of the documents

HEALTH CARE PROXY

- Copy of health care proxies/living wills, with each party giving the other party the power to make health care/non-resuscitation decisions upon incapacitation

LIFE INSURANCE

- Copy of policy with one party naming the other as beneficiary*

RETIREMENT BENEFITS

- Copy of beneficiary designation form with one party designating the other as beneficiary*

*Does not have to be enrollee designating the dependent