

## 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