

**DECLARATION OF TAX STATUS
GRADUATE APPOINTEE INSURANCE PROGRAM**



SECTION I – DECLARATION OF TAX STATUS

Same-sex marriage or domestic partner (partner)

I, _____ and _____, have completed a *Declaration of Marriage or Domestic Partnership* form.
Print or Type Subscriber's Name Spouse or Partner Name

I understand that my employer has a legitimate need to know the federal income tax status of my relationship. I understand that a partner is considered an Internal Revenue Code (IRC) Section 152 dependent only if each of the following requirements is met:

1. The partner and I live together (share our principal abode) for the full taxable year, except for temporary absences for reasons such as vacation, military service, or education. In other words, my partner and I must live together from January 1 through December 31.
2. The partner is a citizen or resident of the United States.
3. The partner receives more than half of his or her support from me. The rules for determining support are complicated and are more involved than just determining who is the "primary breadwinner."

Please Note:

Even if the above requirements are met, an individual cannot be considered an IRC Section 152 dependent if the relationship violates local law.

Check one of the following boxes; **coverage is only available** if you check a box. Since the above is a summary of complex tax rules, we recommend you consult with your tax advisor regarding your specific circumstances.

I declare that:

- Yes**, my partner **is** my Internal Revenue Code Section 152 dependent.
- No**, my partner is **not** my Internal Revenue Code Section 152 dependent. As a result, premium contributions for my domestic partner cannot be taken on a pre-tax basis (under IRC Section 125), and the fair market value of the benefits my employer provides for my partner will be added to my taxable income.
- Yes**, my partner's child(ren) **is** my Internal Revenue Code Section 152 dependent(s).
- No**, my partner's child(ren) is **not** my Internal Revenue Code Section 152 dependent(s). As a result, premium contributions for my partner's eligible family members cannot be taken on a pre-tax basis (under IRC Section 125), and the fair market value of the benefits my employer provides for my partner will be added to my taxable income.

SECTION II – SIGNATURES

By signing below, you are stating that:

I understand that this information will be held confidential and will be subject to disclosure only upon my express written authorization or if otherwise required by law. I understand that this declaration of responsibility may have legal implications under federal and/or state law. I understand that a civil action may be brought against me for any losses, including reasonable attorney's fees, because of a false statement contained in this *Declaration of Tax Status*. I also certify under penalty of perjury, under the laws of the state of Washington, that the foregoing is true and correct.

I, the undersigned subscriber, understand that willful falsification of information on this declaration may lead to disciplinary action, up to and including discharge from my appointment. I agree to notify LifeWise Assurance Company if there is any change in the circumstances attested to in this declaration within thirty-one (31) days of the change. *I am aware that any change in my family tax status may directly impact the calculation of my taxable income.*

Washington State law may require disclosure of any information you submit as a public record.

Subscriber's Signature: _____

Social Security Number: _____

Date: _____

Please return to:
LifeWise Assurance Company
Attn: M&B, MS 737
PO Box 3048
Spokane, WA 99220
Phone: 1-800-971-1491



Discrimination is Against the Law

LifeWise Assurance Company complies with applicable Federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex.

Getting Help in Other Languages

This Notice has Important Information. This notice may have important information about your application or coverage through LifeWise Assurance Company. There may be key dates in this notice. You may need to take action by certain deadlines to keep your health coverage or help with costs. You have the right to get this information and help in your language at no cost. Call 800-971-1491 (TTY: 800-842-5357).

Español (Spanish): Este Aviso contiene información importante. Es posible que este aviso contenga información importante acerca de su solicitud o cobertura a través de LifeWise Assurance Company. Es posible que haya fechas clave en este aviso. Es posible que deba tomar alguna medida antes de determinadas fechas para mantener su cobertura médica o ayuda con los costos. Usted tiene derecho a recibir esta información y ayuda en su idioma sin costo alguno. Llame al 800-971-1491 (TTY: 800-842-5357).

中文 (Chinese): 本通知有重要的訊息。 本通知可能有關於您透過 LifeWise Assurance Company 提交的申請或保險的重要訊息。本通知內可能有重要日期。您可能需要在截止日期之前採取行動，以保留您的健康保險或者費用補貼。您有權利免費以您的母語得到本訊息和幫助。請撥電話 800-971-1491 (TTY: 800-842-5357)。

Tiếng Việt (Vietnamese): Thông báo này cung cấp thông tin quan trọng. Thông báo này có thông tin quan trọng về đơn xin tham gia hoặc hợp đồng bảo hiểm của quý vị qua chương trình LifeWise Assurance Company. Xin xem ngày quan trọng trong thông báo này. Quý vị có thể phải thực hiện theo thông báo đúng trong thời hạn để duy trì bảo hiểm sức khỏe hoặc được trợ giúp thêm về chi phí. Quý vị có quyền được biết thông tin này và được trợ giúp bằng ngôn ngữ của mình miễn phí. Xin gọi số 800-971-1491 (TTY: 800-842-5357).

Tagalog (Tagalog): Ang Paunawa na ito ay naglalaman ng mahalagang impormasyon. Ang paunawa na ito ay maaaring naglalaman ng mahalagang impormasyon tungkol sa iyong aplikasyon o pagsakop sa pamamagitan ng LifeWise Assurance Company. Maaaring may mga mahalagang petsa dito sa paunawa. Maaring mangailangan ka na magsagawa ng hakbang sa ilang mga itinakdang panahon upang mapanatili ang iyong pagsakop sa kalusugan o tulong na walang gastos. May karapatan ka na makakuha ng ganitong impormasyon at tulong sa iyong wika ng walang gastos. Tumawag sa 800-971-1491 (TTY: 800-842-5357).