

SYNOPSIS VERIFICATION REQUIREMENTS

When submitting supporting documentation:

- ✓ Mark out all confidential information such as financial data and social security numbers.
- ✓ Send only copies. DO NOT mail originals. Documentation submitted will not be returned.
- ✓ If a document is two-sided or multiple pages, ensure you copy both sides and all pages of the document.
- ✓ If a document is not in English, you may be requested to supply an official English translation of the document and a copy of the original document.

Eligibility Requirements	Acceptable Supporting Documentation
<p><u>SPOUSE</u> A "Spouse" means the person who is recognized as the Participant's spouse in accordance with the laws of the state, the District of Columbia, a United States territory or a foreign jurisdiction where the marriage took place ("Spouse").</p>	<p>SUBMIT TWO DOCUMENTS - Submit one from PROOF A <u>AND</u> one from PROOF B:</p> <p><u>PROOF A: (to show event occurred)</u></p> <ul style="list-style-type: none"> • Valid legal or religious marriage certificate, which must include: <ul style="list-style-type: none"> ○ Name of the employee and spouse ○ Date of marriage ○ Certifier's signature/official seal • Legal household/family registry, must show spousal relationship <i>(This is only acceptable if you were married outside the U.S. and do not have a marriage certificate.)</i> <p><u>AND PROOF B: (to show current relationship status)</u> <i>(Employees married within the last 12 months do not need to provide Proof B.)</i></p> <ul style="list-style-type: none"> • Your Federal 1040 or State income tax return, which must: <ul style="list-style-type: none"> ○ Be from 2021 or 2022 tax year ○ Contain name of employee and spouse ○ Indicate married filing jointly or married filing separately <p><i>(Only the page listing filing status and exemptions is required-see sample. Form 887-9, the first page of E-Files are not accepted.)</i></p> • Utility bill, which must: <ul style="list-style-type: none"> ○ Be dated within the last 12 months ○ Contain name of employee and spouse as joint owners ○ Contain name of utility company • Document from a bank account or financial institution, which must: <ul style="list-style-type: none"> ○ Be dated within the last 12 months ○ Contain name of employee and spouse as joint owners of the account ○ Contain name of financial institution • Insurance document such as homeowner, renter or automobile, which must: <ul style="list-style-type: none"> ○ Be dated within the last 12 months ○ Show employee and spouse as joint account owners (Individuals listed as "drivers" on automobile insurance documents do not prove joint account ownership) ○ Contain name of insurance company • Mortgage document or current lease, which must: <ul style="list-style-type: none"> ○ Be dated within the last 12 months ○ Contain name of employee and spouse as joint owners or joint renters ○ Contain name of mortgage company, landlord or rental company • Valid vehicle registration, which must: <ul style="list-style-type: none"> ○ Be dated within the last 12 months ○ Contain name of employee and spouse as joint owners ○ Contain name of state or county in which issued

Sample Federal 1040 Form

Please mark out SSN's and Financial Info

Eligibility Requirements

DOMESTIC PARTNER

Your same or opposite sex domestic partner

Sample Federal 1040 Form

The image shows a sample of a 2022 U.S. Individual Income Tax Return (Form 1040). Red boxes highlight specific areas: 'Tax Year and Filing Status' at the top right, 'Employee and Spouse Names' in the middle section, and 'Social Security Numbers' in the bottom left section. The form includes fields for filing status, address, and dependents.

Please mark out SSN's and Financial Info

Acceptable Supporting Documentation

SUBMIT **TWO** DOCUMENTS - Submit one from **PROOF C** AND one from **PROOF D**:

PROOF C:

- Valid Synopsis Domestic Partner Affidavit, which must include
 - Names of the employee and domestic partner
 - Signature of Employee
 - Signature of Domestic Partner
 - Date Domestic Partnership was established
- State-issued Certificate of Domestic Partnership, which must include
 - Names of the employee and domestic partner
 - Date of Certificate
 - Certifier's signature/official state seal

AND PROOF D:

- Utility bill, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners
 - Contain name of utility company
- Document from a bank account or financial institution, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners of the account
 - Contain name of financial institution
- Insurance document such as homeowner, renter or automobile, which must:
 - Be dated within the last 12 months
 - Show employee and domestic partner as joint account owners (Individuals listed as "drivers" on automobile insurance documents do not prove joint account ownership)
 - Contain name of insurance company
- Mortgage document or current lease, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners or joint renters
 - Contain name of mortgage company, landlord or rental company
- Valid vehicle registration, which must:
 - Be dated within the last 12 months
 - Contain name of employee and domestic partner as joint owners
 - Contain name of state or county in which issued
- Your Federal 1040 or State income tax return, which must:
 - Be from 2021 or 2022 tax year
 - Name employee as person filing
 - Name of domestic partner listed as dependent with relationship of "Other"

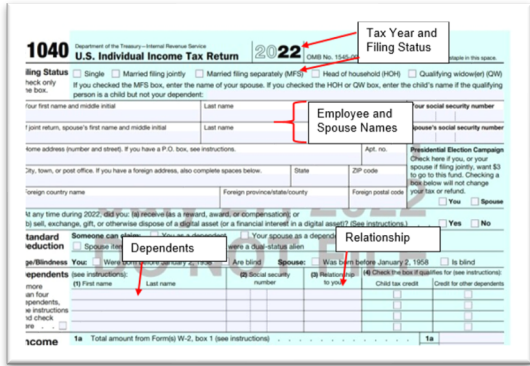
(Only the page listing filing status and exemptions is required-see sample. Form 887-9, the first page of E-Files are not accepted.)

Eligibility Requirements	Acceptable Supporting Documentation
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Child under age 26
 Your children until the end of the month that they reach age 26 which includes:

- a **natural child**, or
- an **adopted child** or a child placed with you for **adoption**, or
- a **stepchild***; or
- a **foster child**, or
- a **child of your domestic partner***
- any other tax-qualified child for whom you have **legal guardianship** or **court-ordered custody**.

Sample Federal 1040 Form



Please mark out SSN's and Financial Info

SUBMIT ONE DOCUMENT- Submit one document from **PROOF E:**

PROOF E:

- Your Federal 1040 or State income tax return, which must:
 - Be from 2021 or 2022 tax year
 - Contain the name of employee or spouse or domestic partner*
 - List your dependent with the relationship as daughter, son or child (*Only the page listing filing status and exemptions is required-see sample. Form 887-9, the first page of E-Files are not accepted.*)
- Child's legal or hospital birth certificate or affidavit of parentage, which must:
 - Contain the name of employee or spouse or domestic partner*
 - Contain the name of the child
 - Indicate date of birth
- Legal household/family registry, must show relationship (*This is only acceptable if the child was born outside the U.S. and you have no legal birth certificate.*)
- Final divorce decree, parental custody agreement or Qualified Medical Child Support Order (QMCSO), which must:
 - Contain the name of the employee or spouse or domestic partner* indicating parentage of the child
 - Contain the name of the child
 - Official signature or stamp indicating document has been filed
- Legal adoption, guardianship or legal custody papers, which must:
 - Contain the name of the employee or spouse or domestic partner*
 - Contain the name of the child
 - Official signature or stamp indicating document has been filed

***Also required to prove the relationship between you and your stepchild:**
If you are an employee providing documentation for a child of your legal Spouse or Domestic Partner, Mercer must receive the required proofs listed for Spouse (Proof A and B) or Domestic Partner (Proof C and D), even if you do not currently cover your Spouse or Domestic Partner.

Eligibility Requirements	Acceptable Supporting Documentation
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Child age 26 and over
 Any dependent **disabled child**, over the age of 26 who otherwise meets the criteria for "child" and is:

- permanently disabled and not able to earn his or her own living because of a physical or mental disability which started prior to the date he or she reaches the maximum age for dependent children under the Plan.

Please note: in order for your disabled dependent to remain on active coverage, the dependent must have been disabled and approved to continue coverage with the medical plan carriers prior to your dependent turning 26. We have a separate process for confirming the disability status. This audit is only confirming eligibility and not your dependent's disability.

SUBMIT ONE DOCUMENT -Submit one from **PROOF F:**

PROOF F:

- Any one of the documents listed for Child under age 26.

***Also required to prove the relationship between you and your stepchild:**
If you are an employee providing documentation for a child of your legal Spouse or Domestic Partner, Mercer must receive the required proofs listed for Spouse (Proof A and B) or Domestic Partner (Proof C and D), even if you do not currently cover your Spouse or Domestic Partner.