

University of California Retirement Plan



Survivor Benefits for Domestic Partners

Effective July 1, 2002, the University of California Retirement Plan (UCRP or Plan) was amended to provide monthly survivor benefits to eligible same-sex and opposite-sex domestic partners of UCRP members—and, in certain circumstances, to a partner's qualified children.

What UCRP benefits are available How a domestic partner qualifies

This section explains the types of UCRP survivor benefits that may now be available to qualified domestic partners. It also outlines eligibility requirements, the documentation required to verify that a domestic partnership exists, and when the documentation must be submitted.

For domestic partnerships that have been registered with the State of California, a copy of the State form (SEC/STATE LP/SF DP-1 *Declaration of Domestic Partnership*) will be the only documentation required. For domestic partnerships that have not been registered, the member must submit a UC *Declaration of Domestic Partnership* (UBEN 250) and three supporting documents. (A list of acceptable documents is on the form.)

Definition of domestic partnership

- You are each other's sole domestic partner in a long-term, committed relationship and intend to remain so indefinitely
- Neither of you is legally married
- You are not related by blood to a degree that would prohibit legal marriage in the State of California
- You are both at least 18 years old and capable of consenting to the relationship
- You are financially interdependent
- You live together and intend to do so indefinitely

UCRP Survivor Benefits

Postretirement survivor continuance— (for retirements on and after 7/1/02)

Benefits paid to eligible survivors when the UCRP member dies after retirement.

- Partnership must have existed for at least one year before retirement date and continuously to the member's death
- Documentation:
 - At (or before) retirement**—member must submit
 - copy of California State form filed with the Secretary of State and dated at least one year prior to retirement date
 - or if no State form**
 - UC *Declaration of Domestic Partnership* and three supporting documents proving that the one-year requirement is met
 - At member's death**—survivor must complete form attesting that partnership has been continuous since retirement date

Death while eligible to retire—

Benefits paid only to a surviving spouse or domestic partner if a UCRP member dies while eligible to retire (that is, age 50 or older with at least five years of UCRP service credit). Includes active employees, those who have left UC but are eligible to receive UCRP benefits, and those receiving UCRP disability income.

- No duration of relationship requirement
- Documentation:
 - **At time of death**—survivor must submit copy of California State form filed with the Secretary of State
 - or if no State form**
 - **Before death**—member must submit UC *Declaration of Domestic Partnership* and three supporting documents

Pre-retirement survivor benefits—

(member is not eligible to retire)

Benefits paid to eligible survivors if the UCRP member dies while employed at UC (with at least two years of service credit) or while receiving UCRP disability income.

- Partnership must have existed for at least one year before the member's death and, in general, the partner must be:
 - responsible for the care of an eligible child,
 - disabled, or
 - age 60 or olderIf the partner is responsible for the care of an eligible child who is the member's natural child, the one-year partnership requirement is waived as long as the child is eligible.
- Documentation:
 - **At time of death**—survivor must submit copy of California State form filed with the Secretary of State
 - or if no State form**
 - **Before death**—member must submit UC *Declaration of Domestic Partnership* and three supporting documentsDocuments must prove that the one-year requirement is met

Eligible children

A UCRP member's child(ren) may qualify to receive postretirement or pre-retirement survivor benefits if they meet eligibility requirements. Beginning July 1, 2002, a domestic partner's natural or adopted child(ren) may qualify also. The domestic partner's child(ren) must

- have been living with or in the UCRP member's care immediately before the member's retirement, disability or death

- have received at least 50 percent support from the member for the year before the member's retirement, disability, or death
- be under age 18, or under age 22 if attending school full time, or disabled while qualified as an eligible child

If a UCRP member has both a domestic partner and eligible children, survivor benefits will be paid to the partner, unless the partner predeceases the children.

California State form

Same-sex domestic partners can register their domestic partner relationship with the State of California. Opposite-sex domestic partners as defined in California Family Code Section 297, i.e., one or

both are over age 62 and eligible for Social Security benefits, may also register.

For more information and forms, go to the following website: www.ss.ca.gov/business/sf/sf_dp.htm

Forms/Other UC benefits

The filed State form or the UC Declaration (with three supporting documents) is used only for monthly survivor benefits from UCRP. Different forms are

required to designate a beneficiary for other UC death benefits, as follows:

| Benefit | Form | Available |
|--|--|--|
| <ul style="list-style-type: none"> UCRP monthly survivor benefits | SEC/STATE LP/SF DP-1 <i>(Declaration of Domestic Partnership)</i> (State form) OR UBEN 250 <i>(Declaration of Domestic Partnership)</i> (UC form) | <ul style="list-style-type: none"> See “California State form” above Online at www.ucop.edu/bencom—select “online forms” or From local Benefits Offices or From the Customer Service Center |
| <ul style="list-style-type: none"> UCRP lump sum death payment UCRP Capital Accumulation Provision (CAP) payment, if any Tax-Deferred 403(b) Plan (UC-managed funds) Defined Contribution Plan Pretax and After-Tax accounts (including Fidelity mutual funds) | UBEN 114 <i>(Designation of Beneficiary)</i> | <ul style="list-style-type: none"> Online at www.ucop.edu/bencom—select “online forms” or From local Benefits Offices or From the Customer Service Center |
| <ul style="list-style-type: none"> Tax-Deferred 403(b) Plan (Fidelity or Calvert) <p>(The Fidelity and Calvert forms include beneficiary information)</p> | Fidelity’s enrollment form (in Fidelity’s enrollment kit) Calvert’s account application (in Calvert’s University of California kit) | <ul style="list-style-type: none"> From local Benefits Offices or From the Customer Service Center or From Fidelity or Calvert Call Fidelity at 1-800-343-0860 Call Calvert at 1-800-368-2745 |
| <ul style="list-style-type: none"> UC-sponsored life insurance (Basic, Supplemental, Core) UC-sponsored Accidental Death and Dismemberment insurance (AD&D) | UPAY 718 <i>(Designation of Beneficiary—Life and AD&D Insurance)</i> | <ul style="list-style-type: none"> Online at www.ucop.edu/bencom—select “online forms” or From local Benefits Offices or From the Customer Service Center |

Health and welfare benefits

At the present time, only same-sex domestic partners are eligible for UC-sponsored health and welfare benefits. The University is committed to offering employees the most comprehensive array of benefits

that budgetary circumstances allow and will continue to explore the possibility of adding these benefits for opposite-sex domestic partners at a future date.

For more information

About UCRP survivor benefits—

- UCRP summary plan descriptions
- *Survivor and Beneficiary Handbook*

About health and welfare benefits—

- *UC Group Insurance Eligibility Factsheet*
- *Your Group Insurance Plans*

These publications and others are available online at www.ucop.edu/bencom, from local Benefits Offices, and from the Customer Service Center.

To reach the Customer Service Center, call 1-800-888-8267 between 9:00 and 4:00 Pacific Time on weekdays.

By authority of The Regents, University of California Human Resources and Benefits, located in Oakland, administers all benefit plans in accordance with applicable plan documents and regulations, custodial agreements, University of California Group Insurance Regulations, group insurance contracts, and state and federal laws. No person is authorized to provide benefits information not contained in these source documents, and information not contained in these source documents cannot be relied upon as having been authorized by The Regents. Source documents are available for inspection upon request (1-800-888-8267). What is written here does not constitute a guarantee of plan coverage or benefits—particular rules and eligibility requirements must be met before benefits can be received. The University of California intends to continue the benefits described here indefinitely; however, the benefits of all employees, annuitants, and plan beneficiaries are subject to change or termination at the time of contract renewal or at any other time by the University or other governing authorities. The University also reserves the right to determine new premiums, employer contributions and monthly costs at any time. Health and welfare benefits are not accrued or vested benefit entitlements. UC's contribution toward the monthly cost of the coverage is determined by UC and may change or stop altogether, and may be affected by the state of California's annual budget appropriation. If you belong to an exclusively represented bargaining unit, some of your benefits may differ from the ones described here. Contact your Human Resources Office for more information.

In conformance with applicable law and University policy, the University is an affirmative action/equal opportunity employer. Please send inquiries regarding the University's affirmative action and equal opportunity policies for staff to Director Mattie Williams, University of California Office of the President, 300 Lakeside Drive, Oakland, CA 94612 and for faculty to Executive Director Sheila O'Rourke, University of California Office of the President, 1111 Franklin Street, Oakland, CA 94607.

Website address: www.ucop.edu/bencom



University of California
Human Resources and Benefits
300 Lakeside Drive, 5th Floor
Oakland, CA 94612-3557

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