

# Teamsters Miscellaneous Security Trust Fund

c/o Southwest Administrators • 1000 South Fremont Avenue, Unit 11 • Alhambra, California 91803  
P.O. Box 1121, Alhambra, California 91802 • (626) 284-4792

January, 2005

**TO: EMPLOYERS AND PLAN PARTICIPANTS OF THE  
TEAMSTERS MISCELLANEOUS SECURITY TRUST FUND**

**FROM: BOARD OF TRUSTEES**

**RE: DOMESTIC PARTNER COVERAGE - SAME SEX  
EFFECTIVE JANUARY 1, 2005**

The Board of Trustees in their August 2004 meeting approved the inclusion in the Teamsters Miscellaneous Security Trust Fund (TMSTF) of coverage for Domestic Partners. The coverage is effective January 1, 2005.

In order to establish coverage, both domestic partners will be required to sign and have notarized a TMSTF's Affidavit of Domestic Partnership. In addition, the applicant must provide to the Fund at least three of the following items:

- Domestic Partnership Agreement
- Joint Mortgage or Lease
- Designation of domestic partners as each other's life insurance or retirement plan beneficiaries.
- Designation of domestic partners as each other's primary beneficiary in a will.
- Joint ownership of motor vehicle, primary checking account or primary credit card account.
- Other documentation satisfactory to the TMSTF confirming mutual financial support.
- If a California resident, only two items will be required if the partnership is registered with the State of California.

California participants wishing to obtain health coverage for their same sex domestic partner are required to register their partnership with the Secretary of State in addition to completing the TMSTF's Affidavit.

In addition, the plan participant and domestic partner will be required to sign and date IRS Form 4506 individually to verify their tax status. If the domestic partner is not a dependent as defined by the IRS then the plan participant will have to pay TMSTF the quarterly tax amount due the IRS based on the value of the benefits provided to his/her domestic partner.

If you are interested in obtaining same-sex domestic partner coverage, please contact the Fund's Administrative Office at (877) 350-4792, extension 601, for information and an enrollment packet.