

Forming a Domestic Partnership

Congratulation on your Life Event! We know there are many decisions that come with planning a life transition, like establishing a domestic partnership. That is why we have this checklist to help you remember a few things to ensure you life event goes smoothly.

When	What You Need to do	Key Resources & Contacts
Before the Event	<ul style="list-style-type: none"> Notify your direct leader of your need to take time off for your ceremony or event. Learn about both your and your partner's benefit options to determine which plans are right for you. Use available resources through the Employee Assistance Program to identify venues for or help plan your event. 	<ul style="list-style-type: none"> For Your Benefit > Start Here > Benefit Options Initiate a Leave with Lincoln Financial online at LincolnFinancial.com or via phone at 1-800-451-2967, option 3. <ul style="list-style-type: none"> To register online use company code REI1938 Employee Assistance Program: www.mylifevalues.com <ul style="list-style-type: none"> Username: REI Password: EAP
After the Event	<ul style="list-style-type: none"> Complete the Life Event Status Change Form and Life Partner Affidavit Forms within 30 days of your partnership and update your benefit elections. Notify the Social Security Administration of any change in your name. Use available resources (such as the Employee Assistance Program) to help manage your life transition (if applicable). Update your current beneficiary information for any life or disability insurance, retirement plans, and your will. 	<ul style="list-style-type: none"> To enroll, complete the Life Event Change Form in Waypoint and then update your benefit elections at hr.rei.com <ul style="list-style-type: none"> If prompted sign in with your username and password. Navigate to Menu > Myself > Life Events. Social Security Administration Employee Assistance Program: www.mylifevalues.com <ul style="list-style-type: none"> Username: REI Password: EAP Voya Financial at 1-833-734-0304 or REI.voya.com Employee Service Center at 1-800-999-4734 or hrhr@rei.com

Returning to Work	<ul style="list-style-type: none"> • If on a leave of absence, confirm your return-to-work date with Lincoln Financial and your direct leader. • Update your personal information in Employee Self Service (name and address, direct deposit, W-4 status and withholding, emergency contact information, etc.) • Request new security badge, name placard, business cards, etc. 	<ul style="list-style-type: none"> • Lincoln Financial at LincolnFinancial.com or 1-800-451-2967, option 3. • Update your personal information through hr.rei.com • REI web > Waypoint > Service Catalog > Campus & Conference Room Services > Building Access Badge
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Affidavit of Life Partnership information

REI recognizes that many employees are engaged in an ongoing and committed spouse-like relationship with an adult of the same or different sex (a life partner). This relationship includes residing together and being jointly responsible for each other's common welfare and financial obligations. In most instances, REI offers the same benefits to an employee's life partner and the eligible dependent children of an employee's life partner as REI offers to an employee's spouse and the children of an employee's spouse.

Married couples are not required to submit this Affidavit, although REI retains the right to request proof of marriage from married couples for Benefit Plan eligibility purposes.

Employees should use this Affidavit of Life Partnership to add a life partner and life partner's children to the REI Benefit Plan "the Plan." However, employees do not need to submit this Affidavit for their own children: in other words, only submit this Affidavit for children of the life partner who are not also children of the employee. Couples who are registered as domestic partners in any state that has a domestic partner registry or who have entered in a civil union can submit proof of their registration or civil union in lieu of the Affidavit of Life Partnership Declaration. For complete information about eligibility and enrollment, see the Summary Plan Description for the REI Benefit Plan on www.foryourbenefit-rei.com.

Children of a life partner must meet the other eligibility requirements for dependent children found in the Plan's Summary Plan Description (such as being under age 26).

You should be aware that by certifying that you and another person are life partners for purposes of the Plan may create other legal rights and duties under state or federal law. Before signing the Affidavit and declaring a life partnership to REI, you both should consider consulting legal counsel.

You should also be aware that in most cases, federal law requires that REI include the value of health coverage provided to a life partner and children of a life partner in the employee's taxable income—this requires that REI impute taxable income to you. "Health coverage" includes medical, dental and vision coverage. The total premium for or value of the health coverage in which your life partner and his or her children are enrolled will be added to your income and is subject to regular income and payroll taxes. You can get more information about the total premium or value of the health coverage that REI offers from the Employee Service Center (ESC) at **1-800-999-4734** or **hrhr@rei.com**. If you have a common law spouse as recognized by the state in which you reside, the rules about imputed income are different; please contact the ESC for details.

Under certain circumstances, your life partner and/or or his/her children may qualify as your tax dependent for purposes of the health coverage provided by the Plan. In that case, the value of the coverage provided to them will not be included in your gross income or be subject to state and federal income or employment taxes. Please review the Certification of Federal Tax Dependent Status for more information. You may obtain a copy of the certification from the ESC.

In signing the Affidavit of Life Partnership, you are certifying that the information on the form is complete, true, timely and correct and that failure to provide complete, true, timely or correct information may result in loss of eligibility for Plan benefits, personal liability for benefits that the Plan has paid to or on behalf of a person who does not qualify as a Life Partner under REI's rules, and/or other disciplinary actions, such as and your termination of employment. You also agree to notify the ESC within 30 days of any change in status of your life partnership (such as including termination of your life partnership) that would impact your life partner's eligibility for benefits.

Enrollment will not be effective until the first of the month following receipt of a completed, notarized Affidavit of Life Partnership by the ESC.

Affidavit of Life Partnership

We, _____ and _____ declare that we meet the following criteria: (print
employee name) (print name of life partner)

1. We have been in a relationship for at least six months.
2. We are each other's sole life partner and intend to remain so indefinitely.
3. We live together and intend to do so indefinitely.
4. We are jointly responsible for each other's welfare and common financial obligations.
5. We are not legally married to anyone else.
6. We are not related by blood to a degree that would prohibit legal marriage; and
7. We are both at least the age of consent in the state where we live.

We understand that certifying that we are each other's life partners may create other legal rights and duties under law. For example, some states have recognized non-marriage relationships as the equivalent of marriage for the purpose of establishing and dividing community property. This Affidavit may establish some or all of the requirements for common law marriage or continuing support obligations under state law.

I, the REI employee, and my life partner represent that the statements made herein are true and correct to the best of our knowledge, information, and belief. We understand that these statements are given for the purpose of establishing our eligibility under the I Plan, and understand that any misrepresentation, whether or not made with intent to deceive, may result in the ineligibility of me and my life partner's benefits under the Plan. We understand that willful falsification of information on this Affidavit may lead to disciplinary action, up to and including termination of employment.

We understand that REI may request additional documentation to validate that we meet the above requirements (e.g., rental agreements, leases, or mortgage documents). We also understand that we must notify the REI Employee Service Center within 30 days if this life partnership is terminated or if there are any changes to the circumstances attested to in this Affidavit.

Employee Signature _____ Date _____

Employee No. Life Partner Signature _____ Date _____