

RETIREE AND DEPENDENT INFORMATION SHEET

WR _____

RETIREE INFORMATION

Retiree Name				Retiree ID Number or SSN		Date of Birth	
Home Address		City	State	Zip Code		Primary phone number	

QUALIFIED STATUS CHANGES MUST BE SUBMITTED WITH DOCUMENTATION WITHIN 30 DAYS OF THE QUALIFYING EVENT.

Date of Change: _____			
Type of Change (circle one):			
Marriage	Birth or Adoption	Dependent Child no longer eligible for benefits	
Divorce	Gained Other Coverage	Death of Dependent	

DEPENDENT INFORMATION:

Last Name	First Name	MI	Social Security # (Required)	Date of Birth (MM/DD/YY)	Gender	Relationship ¹	Add Dependent	Remove Dependent
1.								
2.								
3.								
<i>Address if different from Retiree</i>								

¹ H=Husband, W=Wife, S=Son, D=Daughter, SS=Stepson, SD=Stepdaughter, FS=Foster Son, FD=Foster Daughter, CL=Common Law Spouse, and DP=Domestic Partner

I certify that the above information is correct and that I have read and understand the information on the back of this form.	
_____ Retiree Signature	_____ Date

For questions or assistance, please call Retiree Administration at (800) 333-3377 extension 2283.

FOR BENEFITS ADMINISTRATION USE ONLY

If adding a dependent(s) due to a QSC, completion of this form does not guarantee coverage in the Retiree Plans offered by Valero. If the addition of the new dependent(s) entitles the retiree to a new premium, a letter will be mailed to the retiree. All benefit elections must be made within 30 days from the QSC. The Retiree Benefits Department requires current address information to determine plan eligibility and for continuation of coverage, if applicable, under Federal COBRA regulations.

Qualified Status Changes and required documentation.

Marriage	
Spouse	<ul style="list-style-type: none"> A certificate of marriage is required. To change a name, a copy of the new Social Security card or a receipt from the Social Security office showing that a new card has been requested is required.
Common Law	<ul style="list-style-type: none"> Notarized Affidavit of Common Law Marriage or Affidavit of Domestic Partner Relationship required. Documentation varies by state. The Policy for Common Law Marriage or the Policy for Domestic Partner may be found in the Retiree SPD.
Same Sex Domestic Partners	<ul style="list-style-type: none"> Opposite sex domestic partners must be common law spouses to be considered eligible for coverage. May only be added upon hire or at annual open enrollment, if state does not recognize the unity.
Birth, Adoption, Foster Care or Legal Guardianship	
Age Guidelines	<ul style="list-style-type: none"> Dependent children are eligible through end of month in which they turn 26 as long as they are not otherwise eligible for coverage through their employer.
Children who are the retiree's natural children or are legally adopted by the employee.	<ul style="list-style-type: none"> Birth Certificate or proof of adoption required.
Step children, foster or other children residing with the retiree in a legal guardianship and relying on the employee for support.	<ul style="list-style-type: none"> Proof of foster care or legal guardianship required (except for stepchildren).
Stepchildren, foster or other children where support and coverage are required by a court order.	<ul style="list-style-type: none"> Court decree required.
Children up to any age who are permanently, physically or mentally disabled before age 26, and have been continuously eligible for coverage under the Valero Plans, or for whom coverage is initially requested upon retirement or at annual open enrollment.	<ul style="list-style-type: none"> Must be unable to support themselves, reside with the retiree and depend on the retiree for more than half of his/her support. Proof of permanent disability required.
Loss of Dependent Status	
Divorce	A copy of the final divorce decree or Affidavit of Dissolution of Common Law Marriage required. Please provide a mailing address above so we may notify deleted dependents of their eligibility for COBRA coverage. Rights to continuation of coverage are forfeited if notification of divorce or loss of dependent eligibility is made after 60 days from the date of the event. Refer to your Retiree Benefits Handbook for additional information on Qualified Status Changes.
Significant Change in a Dependent's Benefits	Documentation from the dependent's benefits administrator supporting the significant change in benefits is required.
Death of Dependent	A copy of the dependent's death certificate.

**Mail this form and documentation to Valero Energy Corporation Attn: Retiree Administration MS: E1N,
PO Box 696000, San Antonio, TX. 78269. This form and documentation may also be faxed to (210) 370-5020.
For questions or assistance, please contact (800) 333-3377 extension 2283.**