

PENSION DATA SUBMISSION FORM

(Please copy this form on your copier. - Send completed copy with order.)

Today's date: _____ Attorney's Name: _____

Firm: _____

Address: _____

_____ Zip _____ Phone: _____ EMAIL: _____

Pensionholder: _____ Sex: ____ D.O.B: _____

Pension Plan: _____

Appraisal date: (A /D - Cut-off date of marital property accrual in your State) _____

Marital Separation Date (if different date required for coverture in your State) _____

Salary (gross) on A/D: _____ Marriage Date: _____ Date of Employment: _____

If Pensionholder is retired provide date of retirement: _____ Monthly Retirement Income: _____

If Pensionholder no is longer working under the Plan provide date of termination: _____

A copy of the pension plan booklet and an earned benefits statement current to the A/D is required.

(We have over 15,000 plan booklets on file - Call if you have trouble getting the one you need!)

METHODOLOGY

____ **Deferred Vested Appraisal** (Assumes Participant Stops Working On Marital Cut-Off Date)

____ **Matured Full Benefit Appraisal** (Assumes Participant Works Until Earliest Unreduced Retirement Age)

*In the event that you are unsure of which method is most applicable, we will defer to your State Case Law
and/or the particulars of your client's situation*

FEES FOR SERVICES

____ **Pension Appraisal - \$200. 00**

____ **Both Methods – For Same Participant and Plan - Additional \$50.00**

____ **Same Day RUSH Service (FAX or EMAIL) = Additional \$50.00 per Appraisal**

Alternate Dates: \$50.00 per Additional Date. Please Specify. _____ / _____

***Qualified Domestic Relations Order - \$500.00 – Additional Form Required
Please call 1(800)-368-8086 for QDRO Intake Form
and Additional Instructions***

***All Services are Prepaid - - Please Enclose Your Check
(Courtroom testimony available; call or write for details)***