

## SETTLEMENT LANGUAGE PREPARATION REQUEST

(Please print out or save to disk both pages of the completed form for your records)

Today's date: \_\_\_\_\_ Attorney's Name: \_\_\_\_\_

Firm Name and Address: \_\_\_\_\_

\_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-Mail: \_\_\_\_\_

State in which the divorce action has been filed: \_\_\_\_\_ Marriage Date: \_\_\_\_\_

Retirement Plan(s) Participant: Husband? \_\_\_\_\_ Wife? \_\_\_\_\_ Your client? Wife \_\_ Husband \_\_

Husband's Retirement Plan(s) (Legal names of plan(s) and date participation began, 1,2, 3, etc.)

#1 \_\_\_\_\_

#2 \_\_\_\_\_

#3 \_\_\_\_\_

Use additional space on second page if you need it – just identify the item being added.

Wife's Retirement Plan(s) (Legal names of plan(s) and date participation began, 1,2, 3, etc.)

#1 \_\_\_\_\_

#2 \_\_\_\_\_

#3 \_\_\_\_\_

Appraisal date: (Cut-off date of marital property accrual per legislation or case law\*): \_\_\_\_\_

Date(s) Plan Participation commenced: Husband Plan(s) #1 \_\_\_\_\_ #2 \_\_\_\_\_

#3 \_\_\_\_\_

Date(s) Plan Participation commenced: Wife Plan(s) #1 \_\_\_\_\_ #2 \_\_\_\_\_

#3 \_\_\_\_\_

If husband is retired provide plan #, date of retirement, monthly income and/or lump sum account balance on marital property cut-off date: #1 \_\_\_\_\_

If wife is retired provide plan #, date of retirement, monthly income and/or lump sum account balance on marital property cut-off date: #1 \_\_\_\_\_

A copy of the retirement plan booklet is required (We have over 15,000 plan booklets on file - Call if you have trouble getting the one you need!). An earned benefits statement with either the lump sum account balance if it is a savings or investment plan, or the accrued monthly income amount if it is a pension, current to the marital property cut-off date, is required if you want the settlement to reflect dollar amounts. **Please include you check for \$75.00**

**\* If the parties have agreed upon a different date insert the agreed upon cut-off date**

