

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: _____ E-Mail: _____

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 is no 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!)

FEES FOR SERVICES

All services are prepaid - - Please enclose your check

___ *Pension Appraisal - \$150.00 Please specify appraisal method to be used or call us for guidance*

___ *Deferred Vested Appraisal (only accrued pension benefits on A/D are valued)*

___ *Matured Full Benefit Appraisal (all Plan provisions are considered [i.e., 30 and out full pension] but appraised present value only identifies portion attributable to the marriage on the A/D)*

___ *Both methods - same participant and plan - additional \$50.00*

___ *Same Day RUSH service (FAX or EXPRESS SHIPMENT) = additional \$50.00 per appraisal*

Appraisals for more than one appraisal date (i.e. separation & divorce) are \$50.00 for each date.

(Additional Dates:) _____

___ *Qualified Domestic Relations Order - \$400.00 - Guaranteed Plan acceptance!*

Please call 1-800-368-8086 for a QDRO Intake Form and additional instructions

Growth Analysis Appraisal® - To protect you and your client when dealing with retirement savings plans (401k, etc) with exponential growth during the marital years preceding the break-up and a non-marital property component - Call for Details!

(Courtroom services available; call or write)

FedEx or Express Mail Delivery Address: 1125 12th St., Suite D , Vero Beach, FL 32960

Local Tel.: (772)778-2883