

## 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 and 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 - \$200. 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 - \$500.00 – Guaranteed Plan acceptance!**

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

(Courtroom services available; call or write)

©LawDATA, Inc. 1/1/2008