

**RETIREMENT PLAN SETTLEMENT LANGUAGE PREPARATION REQUEST**  
**(Please print or save to disk 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 Participant(s): Husband? \_\_\_\_\_ Wife? \_\_\_\_\_ Your client? Wife \_\_ Husband \_\_

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

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

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

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

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

If husband is retired, or his participation in the plan has been terminated, provide plan #, date of retirement or termination, monthly retirement income, or accrued benefit if terminated, and/or lump sum account balance on marital property cut-off date: #1 \_\_\_\_\_

If wife is retired, or her participation in the plan has been terminated, provide plan #, date of retirement or termination, monthly retirement income, or accrued monthly benefit if terminated, and/or lump sum account balance on marital property cut-off date: #1 \_\_\_\_\_

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

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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 plan, current to the marital property cut-off date, is required if you want the settlement to reflect dollar amounts.

We will call you for any clarification or if additional information is needed.

**Specific Issues of concern to your client or items/values already agreed to by the parties that you want addressed in the settlement language**

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**Additional comments and/or items that did not fit on the first page of the form**

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**Fee: \$75.00 – per case - regardless of the number of plans for which we prepare language**

**For an additional \$25.00 we will provide *RUSH SERVICE*. Simply fax the completed form and we will e-mail or fax back the completed language and bill you. Rush service is a 3 day turn-around .  
(14-day money-back guarantee on all settlement language preparation services)**

**The completed settlement language will be e-mailed to you in MSWord format. If you do not use MSWord, your word processor should be able to easily convert it. If you have a problem contact us at 1(800) 368-8086.**

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FedEx or Express Mail Delivery Address: 1125 12<sup>th</sup> St., Suite “D” Vero Beach, FL 32960

Local Telephone: (772) 778-2883 Fax: (772) 778-5667

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