

## PENSION DATA SUBMISSION FORM

(Please copy this form - Send completed copy with order)

ATTORNEY: \_\_\_\_\_ FIRM: \_\_\_\_\_

DATE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

FAX: \_\_\_\_\_ PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

Pension Holder: \_\_\_\_\_ Sex: \_\_\_\_\_ DOB: \_\_\_\_\_

Pension Plan: \_\_\_\_\_

Marriage Date: \_\_\_\_\_ Appraisal Date: (Marital Property Cut Off Date): \_\_\_\_\_

Date of Employment: \_\_\_\_\_ Marital Separation Date (If Different): \_\_\_\_\_

Appraisal Date Gross SALARY/RANK: \_\_\_\_\_ If Retired – Provide Date \_\_\_\_\_

If Terminated – Date: \_\_\_\_\_ Monthly Retirement Income as Applies: \_\_\_\_\_

**AN EARNED BENEFIT STATEMENT AS OF THE APPRAISAL DATE IS OFTEN REQUIRED**

### 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

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

\_\_\_\_\_ Same Day RUSH Service (FAX or EMAIL) = Additional \$50.00

Alternate Date/\$50.00 per/ Specify Date(s): \_\_\_\_\_ Reason(s): \_\_\_\_\_

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

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