

DIVORCE VALUATION

NAME / ADDRESS/ CONTACT INFO FOR PERSON REQUESTING VALUATION

NAME OF PARTICIPANT

DATE OF BIRTH

DATE OF EMPLOYMENT

DATE OF PARTICIPATION

DATE OF MARRIAGE

DATE OF TERMINATION (IF ANY)

DATE OF RETIREMENT UNDER PLAN

DATE FOR VALUATION

STATEMENT OF ACCRUED BENEFIT OF PARTICIPANT. THIS WOULD INDICATE MONTHLY BENEFIT EARNED TO DATE. IT SHOULD ALSO IDENTIFY THE RETIREMENT AGE.

IF A CURRENT STATEMENT IS NOT AVAILABLE, THEN GIVE US MOST RECENT STATEMENT.. IF NECESSARY WE CAN CALCULATE BENEFIT, BUT I PREFER NOT TO. THERE WOULD NEVER BE A DISPUTE AS TO VALUE PROVIDED BY SPONSOR.

IF THE SPONSOR DOES NOT HAVE CURRENT STATEMENT AS TO ACCRUED BENEFIT, THEN WE NEED SALARY HISTORY, DEPENDING ON AVERAGING PERIOD THAT PLAN USES, OFTEN THE HIGHEST THREE OR FIVE CONSECUTIVE YEARS.

COPY OF PLAN AND /OR SUMMARY PLAN DESCRIPTION