

PENSION/DIVORCE VALUATION REQUEST FORM

Name of Person Making Request:	
Mailing Address of Requestor:	
Email Address of Requestor:	
Phone Number of Requestor:	
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:	
Additional Notes/Comments: (Past Service Purchased?)	

Please provide a statement showing the participant's current **Accrued Benefit**, what they would receive at retirement **were they to retire today**. This statement would indicate the Monthly Benefit earned to date as well as specify the retirement age when payment commence.

If a current statement is not available, then provide the most recent statement. If necessary we can calculate the benefit, but this is not preferable and may add additional cost and contention.

If the Plan Sponsor can't provide a statement as to the current accrued benefit, then we need salary history for those years included in determining the benefit (often prior 3 or 5 years).

Please provide a copy the Plan Document and/or Summary Plan Description

Please return this form and documentation to Jeff@CompPlanning.com or the address below. The cost for a Pension Valuation is \$500. Check should be **payable to Jeffrey A. Brown** or you may enter the information online via the website and pay via credit card.