

WFA ECONOMETRICS GROUP, L.L.C.

A Forensic Economics Advisory Firm

Authors of Retirement Plan Benefits & QDROs in Divorce, a CCH Publication

PENSION VALUATION CHECKLIST

Retained by:

- Attorney for Participant Participant
- Attorney for Alternate Payee Alternate Payee
- Jointly Appointed by the Court

Full Name of Plan Participant: _____

Full Name of Alternate Payee: _____

Precise Name of Plan and/or Summary Plan Description if possible:

Date of Valuation (i.e. date of separation, date of filing, or date of divorce, etc.) _____

Date of Marriage – if employee/participant was employed prior to the marriage _____

Date of Birth of Plan Participant: _____

Accrued Monthly Benefit (or information from the plan specific to the participant's benefits):

Retainer (2hrs@\$275/hr. payable in Advance or before commencement of work – fee based only on first two hours, additional time billed separately)

Retired? (Plan Participant Spouse) _____ Yes _____ No

If Yes, Provide Date of Retirement _____ or entry into DROP (municipal pensions)

If Retired, did plan participant spouse elect survivor benefits? Yes ___ No ___

_____ Type: 50% J&S, 100% Joint & Survivor

_____ Date of Birth of Alternate Payee

MILITARY:

Reservist or Full-Time Active? _____ Branch of Service _____

Date of Entry into Military (or Years of Service) _____ Date of Retirement _____

If Reservist, please provide a point history Rank or Pay Grade _____

An account statement or letter from the plan may suffice for purposes of obtaining the name of the plan and benefit information.