

WFA ECONOMETRICS GROUP, L.L.C.
A Forensic Economics Advisory Firm

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

RETIREMENT PLAN 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 Retirement Plan:

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: _____

Retirement Plan Statement from Date of Marriage.

Retirement Plan Statements (Quarterly or Annually) up to the valuation date.

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

Attorney Name: _____ **Firm:** _____

Street Address	City	State	Zip
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Phone

E-mail