



Pension Valuation Order Form

Our 12-page pension valuation reports are a useful negotiation tool or trial exhibit. They fully explain the valuation methodology used and calculate the present value of the marital (community) and non-marital shares of pension benefits. Please provide us with as much of the following information as possible. We will try to obtain any missing information at no extra charge to you, but this may delay the valuation of the pension rights.

- Names, date of birth, sex and social security number of the Participant (employee)
- Names, firm names, addresses, and telephone number of the person requesting the report
- Name, address, telephone, and fax numbers of the plan(s) to be valued
- Dates of marriage, separation, and divorce. Please identify the “cutoff” date for acquisition of marital or community property under your State’s law (usually the date of separation or divorce)
- Date Participant began working for the employer (and date of retirement if already retired)

Documents

- Current “Summary Plan Description”
- An “annual benefits statement” for the Participant or “leave and earnings” statement for military plans, dated close to the cutoff date for the acquisition of marital or community property

Fees

Our valuation fee is \$350.00 per plan. Please make checks payable to “QDRO Solutions, Inc.” and mail to us at the address shown below. We normally provide our reports within five (5) business days after receipt of the above material. For expedited service (24 hours after receipt of information), please add \$75.00 for a total of \$425.00 per plan

The fees quoted above do not include testimony at deposition or trial, but we will be pleased to provide it on request. Our hourly rate for expert testimony is \$275.00 per hour, including travel time, plus out-of-pocket travel, lodging, and meals. Many courts will permit expert testimony on pension valuation by conference telephone call which can result in a substantial saving to your client.

Questions or problems? Please call, fax or e-mail us for free assistance.

Thank you for selecting QDRO Solutions, Inc. for your pension valuations.