

# VOIT ECONOMETRICS GROUP, Inc.

A Forensic Economics Advisory Firm

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

## PENSION VALUATION CHECKLIST

Retained by:

- Attorney for Husband
- Attorney for Wife
- Jointly       Appointed by the Court

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

- Full Name of Plan Participant Spouse
- 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 Pension Spouse \_\_\_\_\_
- Accrued Monthly Benefit (or information from the plan specific to the participant's benefits):
- Retainer** (2 hrs. @\$250/hr. payable in advance or before commencement of work – fee based only on first two hours, additional time billed separately)
- Retained by Plan Participant and/or Participant's Attorney?**
- Retained by Non-Plan Participant Spouse or their Attorney?**
- 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 Non-Pension Spouse

### 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 \_\_\_\_\_