

Request for Valuation of Pension Benefits

Instructions: If you are completing this form in Microsoft Word, use Tab to move forward one field, Shift+Tab to move backward one field and the space bar to toggle a check box on/off. You can also move among fields and check boxes with the mouse. Help for each field is provided in the very bottom line of this window and additional help is available by pressing the F1 key while a field is highlighted. You can save a completed or partially completed form at any time.

Please value pension benefits based upon the following information:

1. Participant (the person whose pension is being valued):

Name: _____ Social Security Number: _____
Street Address: _____
City, State & ZIP: _____
Date of Birth: _____ Sex: Male Female
Telephone No. (optional): _____

2. Non-Participant Spouse/Former Spouse:

Name: _____ Social Security Number: _____
Street Address: _____
City, State & ZIP: _____
Date of Birth: _____ Telephone No. (optional): _____

3. Marital History:

Marriage Date: _____ Divorce Date: _____

4. Division Date (the date the accrual of marital benefits is assumed to stop—credited service earned after the Division Date is considered non-marital): _____

5. Valuation Date (the date as of which present values are determined):

The date the valuation is performed * Other date (specify) _____

6. Pension Plan to be Valued:

Plan Sponsor: _____
Contact Person at Plan Sponsor: _____ Phone No: _____
Participant's Date of Hire at Plan Sponsor: _____
 Participant still employed at Plan Sponsor Employment Ended on _____
If employment ended: No benefits paid yet. Benefit payments began on _____
Is Participant receiving a disability pension from the plan? Yes No

Plan's Formal Name: _____

Plan's Normal Retirement Age: _____
Does Plan have a COLA provision or past COLA history? Yes No Uncertain

Is Participant fully vested? Yes No

A benefit statement for the Participant as of, or near, the Division Date is enclosed. *If not included and we have to calculate estimated benefits ourselves, additional fees will apply.*

A pension plan booklet (summary) is enclosed.

7. Assumed Benefit Commencement Age(s): (skip this item if benefits are already being paid)

Value Participant's pension assuming the following benefit commencement age(s). *There is an additional fee for each additional benefit commencement age requested:*

Plan's Normal Retirement Age Age 62 Age 60 Age 55 Other _____

* This is the response that is most typical in our experience.

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8. **Marital Portion-** the marital portion of the benefit should be determined as follows:
(check one box only; if there is no pre-marital benefit, do not check 2nd or 3rd boxes; if benefits are already being paid, do not check last box)

No Coverture Necessary or Desired

Accrued Coverture (Fractional Time Rule) Method: Participant's accrued benefit at the Division Date multiplied by the credited service earned by Participant during the marriage to the Division Date and then divided by Participant's total credited service at the Division Date. This method divides the accrued benefit at the Division Date by assuming that such accrued benefit has increased linearly to the Division Date.

Direct Tracing (Tracking) Method: Participant's accrued benefit at Division Date less the accrued benefit at the Parties' marriage date (or other similar starting date). This method divides the accrued benefit at the Division Date by reflecting the actual rates of annual benefit accrual that have occurred during the marriage to the Division Date. *NOTE: This method requires an additional benefit statement as of, or near, the Parties' marriage date (or other similar starting date).*

Prospective Coverture (Fractional Time Rule) Method: Participant's projected benefit at the assumed benefit commencement date multiplied by the credited service earned by Participant during the marriage to the Division Date and then divided by Participant's total credited service at the assumed benefit commencement date. This method divides the projected benefit at the assumed benefit commencement date assuming that such projected benefit has increased linearly to the assumed benefit commencement date. *NOTE: This method requires that benefit statement projects benefits payable at the assumed benefit commencement date(s).*

Note: The last three boxes of this item 8 are listed in ascending order of magnitude of present values typically produced. The Accrued Coverture Method generally produces the lowest present value and the Prospective Coverture Method generally produces the highest present value.

9. In valuing the accrued benefit at the Division Date (or the marital portion thereof), assume: (*skip this item if active Plan participation has already terminated*); (check one box only)

Participant continues active Plan participation until the assumed benefit commencement age for the sole purpose of qualifying for the Plan's most favorable treatment of the benefit being valued. *

Participant's active Plan participation terminates immediately.

10. **Assumed Taxes:**

In determining after-tax present values, assume Participant's pension will be subject to federal income taxes in the _____ % bracket and state income taxes in the _____ % bracket.

NOTE: If this item is not completed, we will assume whatever estimated percentage taxes we consider appropriate based upon our knowledge and assessment of relevant factors including anticipated pension, social security and, if applicable, compensation.

* This is the response that is most typical in our experience.

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Delivery Options for Sending Completed Valuation(s): (check one box only)

1st Class U.S. Mail E-mail PDF version of valuation(s) to:

Required Fee:

There is a \$400 * fee for the first assumed benefit commencement age requested and a \$125 * fee for each additional assumed benefit commencement age requested that is payable before work begins.

For first assumed benefit commencement age requested... \$ 400 *
PLUS \$125 * times (number of additional calculations needed) = \$
PLUS RUSH fee (see below) \$
TOTAL FEE \$

72 hour turnaround * is requested. An additional fee of \$125 * is enclosed for this service.

The total fee is enclosed. Make check payable to Pension Division by QDRO or PDQ.

\$ of the total fee is enclosed. The balance of the fee will be: sent shortly. paid by

The above fee is for preparing the requested valuation only and does not include time spent testifying, being deposed or answering questions in connection with the requested valuation or any other matter.

In the event the parties decide that this or any other pension is to be divided rather than offset, we would be pleased to prepare drafts of any necessary domestic relations orders. Because of the efficiencies in our order preparation system and the fact that we will already have much of the information we need to prepare orders in this case, we will credit \$50* of the fee paid for this valuation against our usual fee for preparing an order dividing the Participant's interest in the Plan valued.

Completing this Request form fully and accurately increases the likelihood that our valuation can be completed expeditiously without the need to request additional information.

We understand that PDQ, L.L.C. is not a law firm and cannot render legal opinions. We request that PDQ, L.L.C. provide the specified calculations for review by the attorney(s) involved in this case.

Signature of person completing this Request Date of signing this Request
Participant's attorney Non-Participant's attorney Other
Telephone Number: Fax Number:

* Fees shown are those effective November 1, 2006 and are subject to change without notice. Higher fees may apply to certain other or unusual calculations. 72 hour turnaround subject to current availability. Contact PDQ, L.L.C. for details.

Please fax completed Request form to 248-324-1497 or mail to PDQ, L.L.C., P.O. Box 2247, Farmington Hills, MI 48333-2247. If completed by computer, the Request form can be e-mailed to mitchmallin@qdrexpert.com. The required fee (made payable to Pension Division by QDRO or PDQ) must be mailed. If you need help, call us at 248-324-0099 (or toll-free at 866-324-0099).