PENSION VALUATION REQUEST FORM

Rhode Island

REQUESTORS NAME: MAILING ADDRESS: CTY:	DATE: CLIENT'S NAME			AME:	COUNTY:				
MAILING ADDRESS:									
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InterProtokies PAR:(CITY:		STATE:	Rhode Islan	d ZIP:			
Methods of Valuation For Court Ordered Report: Docket # GAT GAN Mailly Tables SEX: DATE OF MRTH: GAN Mailly Tables SEX: DATE OF MRTHE MARE OF PENSION PLAN: The Table as dose as possible to the Trial Date Briceno, 566 A.2d 397-1989 Reource of the Marking CP Market Table Table Mail Core PENSION PLAN: The Table as dose as possible to the Trial Date Briceno, 566 A.2d 397-1989 Reource of the Market Table MARE OF PENSION PLAN: The Table as dose as possible to the Trial Date Briceno, 566 A.2d 397-1989 Reource of the Market Table MARE OF PENSION PLAN: The Table as dose as possible to the Trial Date Briceno, 566 A.2d 397-1989 Reource of the Market Table MARE OF PENSION PLAN: Termination Date: Terminating rendering the maret part of the Marate as a	TELEPHONE:	()		FAX:	()	E-MAI	L:		
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City:State:ip:	□ GATT			Add					
PBGC (CAM Mortally Tables & Phone:			-	s) City:		State:	Z	Zip:	
PEQUIRED INFORMATION ABOUT PENSION HOLDER NAME:				Phor	Phone: Fax:				
NAME:					-	e to the Trial Date [H	3riceno, 566 A.2d	397-1989]	
DATE OF MARRIAGE									
NAME OF PENSION PLAN: DATE EMPLOYMENT STARTED:	NAME:			SEX:	_ SEX: DATE OF BIRTH:				
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DATE EMPLOYMENT STARTED:						Ki- [Cut-0.	if uate used to determ	me maritar coverture maction	
Please indicate any breaks in service:	NAME OF PEN	SION PLA	N:						
Employment Start/Stop Dates: Termination Date: Performent Date: Was a survivor option selected? Yes, In 16 yes, consider having the surviving spouse's benefits valued, is the Period Date Start (1990) If yes, are Social Security Disability Benefits being paid? Yes (1900) Yes (1900) VORMAL RETIREMENT AGE: Interfainties gengloyee can retire and receive surdaced benefits. ** OPERDONTHIL PERION BENEFIT AG OF DDD WAS \$ (OULAIS PERMONTH) ** CONCED MONTHIL YENGON BENEFIT AG OF DDM WAS \$ (OULAIS PERMONTH) ** STHE EMPLOYEE ELIGIBLE FOR POST-RETIREMENT COST-OF-LIVING INCREASES? Yes (1900) Yes (1900) ** STHE EMPLOYEE ELIGIBLE FOR POST-RETIREMENT COST-OF-LIVING INCREASES? Yes (1900) Yes (1900) No Ri-no case law ** If the answer is reve what has been the average bibitrical precentage increase per year *s. If you do not fill in the precentage, we will assume a rate ** THE EMPLOYEE ELIGIBLE FOR POST-RETIREMENT COST-OF-LIVING INCREASES? Yes (1900) Yes (1900) No Ri-no case law ** If the employee waid a bibitrical precentage increase per year *s. If you do not fill in the precentage, we will assume a rate ** OTHE EMPLOYEE ELIGIBLE FOR POST-RETIREMENT COST-OF-LIVING INCREASES? Yes (1900) Yes (1900) ** If the employee analysis, we nead a bistory of yearly earting while a partic						(Date pension holder	began participation in	the plan)	
Retirement Date: Was a survivor option selected? Pyse _ No _ If yese, consider having the surviving spouse's benefit valued. Is the Pension Holdier receiving Disability Benefits being paid? Pyse _ No _ Rt+Atlated, ros A 2d 554 (1998) and Kirk, 57 A. 2d 976 (1990) [I yes, are Social Security Disability Benefits being paid? Pyse _ No _ Rt+Atlated are environed and the provide service unreduced benefits. * ACCRUED MONTHLY PENSION BENEFIT AS OF					_				
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If yes, are Social Security Disability Benefits being paid?Rt-Earliest age employee can retire and receive unreduced benefits) * * * * * * * * * * * * * * * * * * *	Retirement	: Date:	Was a si	urvivor option se	elected? Yes No	If yes, consider ha	ving the survivin	ig spouse's	
NORMAL RETIREMENT AGE:	If yes, are So	cial Security I	Disability Benefits b	eing paid?	Yes 🛛 No R	-[Allard, 708 A. 2d 554 (199	98) and Kirk, 577 A. 2c	[976 (1990)]	
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*IS THE EMPLOYEE ELIGIBLE FOR POST-RETIREMENT COST-OF-LIVING INCREASES Yes No R-no case law If the answer is yes, what has been the average historical percentage increase per year	[This is the amount of m	inthly pension be	IN DEINEFIT AS O	F d be entitled to if it we	re assumed that the employee	VAS D was of normal retirment ag	e (earliest age employ)	ee can	
If the answer is yes, what has been the average historical percentage increase per year									
*WILL THE EMPLOYEE RECEIVE SOCIAL SECURITY FOR THE YEARS OF PLAN PARTICIPATION? 'WALL THE EMPLOYEE RECEIVE SOCIAL SECURITY FOR THE YEARS OF PLAN PARTICIPATION? 'Yes No 'If no, consider requesting a Social Security Offset Report. Reference these cases RIn/a Index to complete this type of analysis, we need a history of yearly earnings while a participant is in the plan. Additional charge \$125.00. *'STHE EMPLOYEE FULLY VESTED? 'Yes No ''If you are unable to answer these questions, we will determine the answers AT NO ADDITIONAL CHARCE if you enclose the following: (A) care the pension plan topic represent on corp). ''If projeyee's annual benefit statements as of a date within 12 months of the Date the Marriage Ended. Charphoyee's incomplexibility for the five years preceding the Date the Marriage Ended. '' Have eenclosed my check. pagable to Pension Appraisers, Inc. for \$240.00 Requests accompanied by personal checks or personal busines checks will be held for 2 weeks to ensure the check clears. This does not apply to firm/attorney checks. '' Card Number: Date:								v	
If I no consider requesting a Social Security Offset Report. Reference these cases REn/a in order to complete this type of analysis, we need a history of yearly earnings while a participant is in the plan. Additional charge \$125.00. *IS THE EMPLOYEE FULLY VESTED? Yes No	equal to a 5 year average	ge of 60% of the in	crease in the Consumer P	rice Index for the year	prior to the Date of Valuation	in the percentage, we will a	ssume a rate		
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I have enclosed my check payable to Pension Appraisers, Inc. for \$240.00 Requests accompanied by personal checks or personal business checks will be held for 2 weeks to ensure the check clears. This does not apply to firm/attorney checks. Card Number: Image: Card Number: Mastercard Amex Discover Visa Signature: Date: Mame on the credit card: Cardholder's phone number: phone number: ADDITIONAL SERVICES Date: Please provide appraisals based upon more than one Valuation Date (Separation Date, Divorce Date, etc.) Need Help? Please provide appraisals based upon more than one Valuation Date (Separation Date, Divorce Date, etc.) PLOATES: SOCIAL SECURITY OFFSET REPORTS: Additional \$125.00 per pension L800-447-008 Fax: 610-770-934 Penapp@pensionappraisers.com COURT TESTIMONY: We will provide expert testimony regarding our appraisals. Our fee is \$1295.00 per day. QUALIFIED DOMESTIC RELATIONS ORDERS: Our fee for drafting a QDRO (from start to finish) is \$495.00					Iarriage Ended.				
Card Number: Anex Exp. Mastercard Anex Exp. Discover Visa Signature: Date: Exp. Name on the credit card: Cardholder's Date: Date: Date: Name on the credit card: Cardholder's phone number: Date: Phone number: MULTIPLE VALUATIONS: Additional \$200.00 per pension. Please provide additional reports based upon the following: Need Help? Please provide appraisals based upon more than one Valuation Date (Separation Date, Divorce Date, etc.) PLOSION APPRAISERS, INC DATES: (Each Additional \$200.00) P.O. Box 439 Allentown, PA 18105-439 1-800-447-008 SOCIAL SECURITY OFFSET REPORTS: Additional \$125.00 per pension 1-800-447-008 EXPEDITED SERVICE: Additional \$125.00 (24-hour business day turn-around via fax or email). Fax: 610-770-934 COURT TESTIMONY: We will provide expert testimony regarding our appraisals. Our fee is \$1295.00 per day. Penapp@pensionappraisers.com QUALIFIED DOMESTIC RELATIONS ORDERS: Our fee of drafting a QURO (from start to finish) is \$495.00 Penapp@pensionappraisers.com			•	, , ,	•				
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Mastercard Amex Exp. Discover Visa Signature: Date: Date: Name on the credit card: Cardholder's phone number: Date: Date: Date: MultTipLe VALUATIONS: Additional \$200.00 per pension. Please provide additional reports based upon the following: Need Help? Please provide appraisals based upon more than one Valuation Date (Separation Date, Divorce Date, etc.) Need Help? Please provide appraisals based upon more than one Valuation Date (Separation Date, Divorce Date, etc.) P.O. Box 439 SOCIAL SECURITY OFFSET REPORTS: Additional \$125.00 per pension 1-800-447-008 EXPEDITED SERVICE: Additional \$125.00 (24-hour business day turn-around via fax or email). Fax: 610-770-934 COURT TESTIMONY: We will provide expert testimony regarding our appraisals. Our fee is \$1295.00 per day. penapp@pensionappraisers.com		Г						HECKS.	
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