QDROExpress - Pension Valuation Data Needed

Please complete the following, and fax or mail it to QDROExpress at:

> QDROExpress, LLC
> 22919 Eureka Rd.
> Taylor, MI 48180
> (734) 675-8207
> Fax (734) 671-3741
> Bob.Treat@qdroexpressllc.com

1. Name of the Plan for which you want a pension valuation:

    _____

2. Estimated monthly benefit payable (This estimate should be from an employer provided pension benefit estimate that shows a breakdown of the basic accrued benefit and any early retirement benefit such as early retirement supplements/subsidies, etc. The estimate should also show how long any early retirement benefit will be payable, e.g. from early retirement age until age 62)[1]:
    a. Basic Accrued Benefit: _____
    b. Early Retirement Benefit: _____
    c. Early Retirement Benefit Duration: _____

3. Is the above estimated monthly benefit the amount that has already accrued (meaning the amount that would be payable if no further service is credited to the participant's benefit), or does the above monthly estimated benefit presume additional credited service until the date the benefit is payable? [check one]
    ___ The estimated benefit does not presume additional credited service.
    ___ The estimated benefit presumes additional credited service.

4. ☆☆☆Participant's age when the above estimated benefit becomes payable: _____ (there may be more than one choice in the benefit estimate – indicate which one here)

5. The percentage of any *guaranteed* annual cost-of-living adjustments (to the benefit once it commences) (e.g. 3%): _____ Is this percentage compound interest or simple interest: [check one] ___ compound ___ simple

6. Participant's name, date of birth, gender and date of hire:
    Name: _____
    Date of Birth: _____
    Gender: ___ Male ___ Female
    Date of Hire: _____
    Date of Marriage: _____

7. The total current estimated value of the pension will be calculated. Is the marital portion of the pension also to be calculated? (This applies if there were premarital accruals, and/or if the estimated benefit presumes additional credited service until the benefit commences): ___ yes ___ no

QDROExpress may require clarification of the above data, and may also require additional information, depending on the circumstances of the case. Please contact Bob Treat per the contact information at the top of this page.

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[1] Please provide a copy of the **employer provided pension benefit estimate**, if available. If an employer provided pension benefit estimate is not available, the pension valuation will be prepared using the data provided on this form and any other data provided.