

# DEFINED CONTRIBUTION RETIREMENT PLAN APPORTIONMENT FORM

## Attorney / Mediator / Other Mailing Information

Name:	<input type="text"/>	Firm:	<input type="text"/>
Street Address:	<input type="text"/>	City:	<input type="text"/>
State:	<input type="text"/>	ZIP:	<input type="text"/>
Phone:	<input type="text"/>	FAX:	<input type="text"/>

## Case Information

Pensioner Name:	<input type="text"/>	Date of Marriage:	<input type="text"/>
Employer:	<input type="text"/>	Name of Plan:	<input type="text"/>
Date Entered Plan:	<input type="text"/>	Is the Pensioner still employed?	<input type="radio"/> Yes <input type="radio"/> No
		If "NO", Date of termination:	<input type="text"/>

Date spouse's interest in plan ends:

*(Date of separation, filing, dissolution or trial as appropriate in your state.)*

## The "Tracing Method"

The "Tracing Method" is one common method of tracing changes in contributions, forfeitures and earnings less fees during the statement period. If this methodology is not acceptable in this case due to laws in your state or otherwise, please check here:  And one of our economists will contact you.

## Documentation We Require

Did the pensioner enter plan after date of marriage?  Yes  No

If "NO", send each and every periodic statement from immediately before marriage to present.

Did the spouse's interest in the pension end recently?  Yes  No

If "NO", send each and every periodic statement from immediately before spouse's interest ended to present.

If the answers to both questions were "YES", you may not need the plan apportioned unless there were loans, transfers or rollovers during marriage, since all the contributions and earnings were marital.

## Payment Information

Please enclose a check for \$250 payable to Legal Economic Evaluations, Inc.

For more complex tracings, one of our economists will contact you to discuss our fees.

We make no attempt to independently verify your data.

The accuracy of our report depends upon the validity and completeness of the data submitted with this form.