



DEFINED CONTRIBUTION RETIREMENT PLAN

Unique Identifying Number (For Office Use Only):

Date:

CONTACT INFORMATION

Contact Name:

Firm Name, If Applicable:

Address:

City:

State:

Zip Code:

Telephone:

Fax:

E-mail:

CASE INFORMATION

Name of Pensioner:

Gender:

Employer:

Name of Plan:

Pensioner's Date of Birth:

Date Pensioner Entered Plan:

Pensioner Still Employed in this Plan:

If No, Date of Termination:

Spouse Name:

Spouse Date of Birth:

Date of Marriage:

Date Spouse's Interest Ends:

The Tracing Method is a common method of tracing changes in marital and separate property in the pension account.

If this method is NOT acceptable in this case due to laws in your state or otherwise, please initial here

If this method is NOT acceptable one of our Professionals will contact you.

INFORMATION REQUIRED

If Pensioner entered pension plan BEFORE:

marriage send each and every periodic statement,
from immediately before marriage to present

If Pensioner entered pension plan DURING:

marriage send each and every periodic statement,
from immediately before spouse's interest ended to present

Enclose copies of any other recent correspondence regarding pension benefits.

Is there anything else unique about the pension that we need to know? If yes, please provide details: