

PENSION EVALUATORS[®] AT TROYAN, INC.

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Troyan's Basic Defined Contribution Pension Evaluation Express Form ACCUCALC[®]

This form is to be **COPIED PER EVALUATION** and **SUBMITTED** via either email, fax or mail to this office

TODAY'S DATE: _____ Complete this Section for Mailing Purposes:

ATTORNEY'S/MEDIATOR'S/CLIENT'S NAME: _____

FIRM NAME: _____

BUILDING, STREET, SUITE, P.O. Box: _____

CITY, STATE, ZIP CODE: _____

TELEPHONE: _____ Fax: _____ EMAIL: _____

PARTY YOU REPRESENT: () HUSBAND () WIFE () BOTH (MEDIATION)

END OF MARRIAGE DATE (CUTOFF DATE): _____ DATE OF MARRIAGE: _____
(I.e. Date Complaint Filed, Date Summons Served. If no end of marriage date, simply indicate CURRENT)

PENSIONER NAME: _____ SEX: _____ DATE OF BIRTH: _____

PLAN NAME: _____

DATE OF PLAN ENTRY: _____ NORMAL RETIREMENT AGE: _____

“✓” check box for requested service and remit documents required to perform specified evaluation:






Determine the Marital Value of Defined Contribution Plans:

- ☐ **Coverture Fraction Isolation Method** **\$150.00**
This method creates a fraction of total years in the plan through the account balance as of the End of Marriage Date over the total marital years contributing to the plan. A fraction is created and run against that balance. This method creates the actuarial reduction to marital/community value based on the length of plan contribution to the End of Marriage Date. In other words, that account balance is multiplied by the coverture fraction to determine the value of the account for marital/community property. In sum the coverture fraction isolation method is based on time sensitive calculations which are applied to the account balance as of the End of Marriage Date, creating the coverture fraction to that balance. The result is the value of the account for Marital/Community Property. Required is account balance as of the end of marriage date.
- ☐ **Subtraction Method** **\$200.00**
This method as it states, subtracts the pre-marital amount from the amount on or about the End of Marriage Date. The account balance as of the End of Marriage Date is then subtracted from the account balance as of the Date of Marriage. The difference in the account balances is the value of the account for Marital/Community Property. Required is the account balances as of the date of marriage and as of the end of marriage date.
- ☐ **Tracing/Segregation Method** **Beginning at \$500.00**
The account balance on the Date of Marriage, plus the gain/loss investment experience attributable to this sum is subtracted from the account balance on the End of Marriage Date. The difference is the value of the account for Marital / Community Property. Required are the statements with Investment experience from the Date of Marriage to the End of Marriage Date.
- ☐ **Add QUICKCALC[®] Rush Service** **\$100.00**
24-hour business day turn-around via fax or email. Note fee applies to one plan. For multiple plans, and additional services, please call for rates.

♦ ACCUCALC[®] PenEval Report ♦ Immediate Offset Settlements ♦
♦ New ACCUQDRO services also available ♦ Deferred Distribution Settlements ♦

COURT TESTIMONY: We will provide expert testimony regarding our Pension Evaluations.
We provide expert testimony telephonically or in person at the courthouse. Request our Expert Testimony package.

PENSION EVALUATION EASYPAY FOR FURTHER DETAILS CONTACT PENSION EVALUATORS[®] AT TROYAN, INC.

<input type="checkbox"/> EasyCharge[®]    	Credit Card Number: _____	Expiration Date: _____
Charge Credit/Debit Card in the Amount of \$ _____	Billing Street # or PO Box #: _____	Billing Zip Code: _____
<input type="checkbox"/> Check 	Print Cardholder's Name: _____	
Enclosed in the Amount of \$ _____	Cardholder's Signature: _____	
If Attorney Card Payment on Behalf of: <input type="checkbox"/> Husband <input type="checkbox"/> Wife	(Please type full name which will electronically validate form when sent via email)	

