Moon, Schwartz & Madden

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California Pension Valuation / Tracing Intake Form

Attorney ☐ Mediator ☐ or Self Represented ☐

Name _____ Phone _____ Fax _____
Firm Name _____ Email _____
Address _____
City _____ State _____ ZIP _____

Representing: ☐ Participant or ☐ Non-Participant Spouse Name: _____

Jointly Retained? ☐ Yes ☐ No Joint Party's Email _____

Participant Information:

Name_____ Gender _____
Address _____ Phone _____
City _____ State _____ ZIP _____
Plan Name _____
(If there are additional plans please provide detail on supplemental form)
(Defined Contribution Plans) Were there contributions prior to marriage? Yes ☐ / No ☐

Statistical Information: Please provide all applicable dates

Marriage: _____ Separation: _____
Plan Entry: _____ Date _____ Terminated ☐ Retired ☐
Birth (Participant): _____ Birth (Non-Participant Spouse) _____

Is Participant currently collecting a monthly pension: ☐ Yes ☐ No Monthly pension amount $_____
(Pensions) If yes, what form of payment was elected at retirement ? (e.g. Single Life Annuity, 50% Joint and Survivor benefit, etc.)
_____

Please Enclose the following if participant is not already collecting their benefit:

Pension Valuation

- Most recent statement of accrued benefits from plan administrator, if available.

Tracing

- If contributions were made to the account(s) prior to marriage, please provide all quarterly account statements from the date of marriage through the most recent available. Please do not staple statements.
- If no contributions were made prior to marriage, please provide all quarterly account statements from the date of separation through the most recent available. Please do not staple statements.

Our fee for a pension valuation is $375 per plan.
Our hourly rate for tracing is $375/hour and we can generally trace 5 years of quarterly statement per hour.
A retainer request will be provided via e-mail and payment is required before work can begin.