

# Moon, Schwartz & Madden

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## Wisconsin 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 \_\_\_\_\_

Name of pension plan \_\_\_\_\_

(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**

Date of Marriage: \_\_\_\_\_

Date of Divorce : \_\_\_\_\_

Date Plan Entry: \_\_\_\_\_

Date \_\_\_\_\_ Terminated      Retired

Date of Birth (Participant): \_\_\_\_\_

Date of 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 divorce through the most recent available. Please do not staple statements.

**Our fee for a pension valuation is \$325 per plan.**

**Our hourly rate for tracing is \$325/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.**