

## PRESENT VALUE AND PASSIVE GROWTH REQUEST FORM

Request for Present Value of Defined Benefit Plan \_\_\_\_\_ (\$350/ea)

Request for Passive Growth of Defined Contribution Plan \_\_\_\_\_ (\$350/ea)\*

*(Note: Please see the fee structure on page 2 for passive growth fees involving (1) date range of greater than 10 years or (2) missing statements)*

### 1. Requesting Attorney Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Represents:  Non-Participant  Participant

### 2. Case Information

County: \_\_\_\_\_

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

### 3. Plan Participant Information

Participant's Full Name: \_\_\_\_\_

Participant's Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Employment Status:  Active  Inactive  Retired

### 4. Spouse's Information

Spouse's Full Name: \_\_\_\_\_

Spouse's Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

### 5. Employer / Plan Information

Name of Employer: \_\_\_\_\_

Name of Plan: \_\_\_\_\_ Date of Hire (if known): \_\_\_\_\_

Name of HR or Customer Service Representative: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## 6. Documentation Needed for Defined Benefit Plan Present Values:

### Traditional Defined Benefit Plans

- Accrued monthly pension benefit estimate evidencing when the estimated amount is payable
- If in payout status, the monthly amount of the benefit and form of benefit elected
- If the participant is unable to obtain the above information, the participant may complete a limited authorization form ([click to access](#)).

### Ohio Public Retirement Systems (PERS, SERS, STRS, OP&F, and HPRS)

Limited Authorization form for the appropriate Ohio retirement system ([click on the appropriate retirement system above for the relevant form](#))

### Social Security

For the Social Security valuation, the Social Security participant must obtain and provide a wage earnings statement showing earnings for each year. That can be easily obtained by the participant creating an account and downloaded the statement here: <https://secure.ssa.gov/RIL/SiView.action>.

## 7. Documentation Needed for Passive Growth of Separate Property in Defined Contribution Plan

Monthly or quarterly statements for the entire time period in question (typically date of marriage to valuation date) are necessary to trace the passive growth of premarital balance in defined contribution plans.

### Fee structure for a passive growth analysis:

- \$350** - Valuation range is 10 years or less and all statements are provided or able to be obtained.
- \$450** - Valuation range is greater than 10 years and all statements are provided or able to be obtained.
- \$550** - Valuation range is 10 years or less and there are some missing statements.
- \$650** - Valuation range is greater than 10 years and there are some missing statements.

### ***Who conducts the analysis?***

*Al Minor & Associates, Inc. will conduct the present value and passive growth services. All information and documentation will be provided to consulting actuary Al Minor of Al Minor & Associates, Inc. and the final report will come from Al Minor & Associates, Inc. Please contact QDRO Partners (614-962-6900) or Al Minor & Associates, Inc. (614-899-0636) for additional information.*