

L1001 - Request For Pension Actuarial Valuation Upon Marriage Breakdown

Version 2014.01



Member Information

First Name	<input type="text"/>	Last Name	<input type="text"/>
Gender	<input type="text"/>	Date of Birth	Year <input type="text"/> Month <input type="text"/> Day <input type="text"/>
Life Expectancy	<input type="checkbox"/> Normal		<input type="checkbox"/> Sub-Normal (1)
(1) If Sub-normal, Explain Why	<input type="text"/>		

Spouse Information

First Name	<input type="text"/>	Last Name	<input type="text"/>
Gender	<input type="text"/>	Date of Birth	Year <input type="text"/> Month <input type="text"/> Day <input type="text"/>
Life Expectancy	<input type="checkbox"/> Normal		<input type="checkbox"/> Sub-Normal (1)
(1) If Sub-normal, Explain Why	<input type="text"/>		

Company Information

Full Legal Name	<input type="text"/>		
Member Status	<input type="text"/>	Work Schedule	<input type="text"/>
Date of Termination/Retirement	Year <input type="text"/>	Month <input type="text"/>	Day <input type="text"/>
If Retired Pre-65, Pension Amount	<input type="text"/>		
If Retired Post-65, Pension Amount	<input type="text"/>		
If Retired, Form of Pension Chosen	<input type="text"/>		

Marriage Information

Date of Marriage	Year <input type="text"/>	Month <input type="text"/>	Day <input type="text"/>
Separation Date	Year <input type="text"/>	Month <input type="text"/>	Day <input type="text"/>
Calculation Date (Current Date)	Year <input type="text"/>	Month <input type="text"/>	Day <input type="text"/>

Pension Information		
Pension Plan Name	<input type="text"/>	
Plan Text/Summary Included ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Person Profile (for B.C. Provincial Sector Plans)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Latest Member Annual Pension Statement ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Authorization Included (3) ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do You Want An External (Written) Report ? (the fee for this report is \$1,500 plus taxes)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do You Want An Internal (Telephone) Report ? (the fee for this report is \$750 plus taxes)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Fees Enclosed (4) ?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do You Want A Recording of the Teleconference ? (the fee for this service is \$50 plus taxes)	<input type="checkbox"/> Yes	<input type="checkbox"/> No

For more information about our services and fees, please visit the Matrimonial FAQ on our website at www.westcoast-actuaries.com/information-centre/legal-evidence/information-guide.aspx

(2) For members of B.C. Provincial Public Sector Plans (Public Service, Municipal, College, Teachers and Worksafe B.C. plans), the member profile is available for free from the Pension Corporation at www.pensionsbc.ca

(3) A sample authorization includes the member's signature, member's Social Insurance Number, the date signed, and a statement authorizing Westcoast Actuaries Inc. to receive information concerning the member's participation in the pension plan. Sample wording is:

I, (member name), hereby authorize the plan administrator to reveal details of my pension plan participation to Westcoast Actuaries Inc.

(4) Prepayment of fee by cheque or credit card is required if this request is made by the Member or the Spouse. **If this request is made by a lawyer or mediator, please complete and sign the section below:**

Name of Lawyer/Mediator: _____

Company Name: _____

Address: _____

I hereby undertake to pay Westcoast Actuaries Inc.'s fee for their pension actuarial valuation services.

Signature: _____

Date: _____