McKeating Actuarial Services, Inc.
www.mckeating-actuarial.com

# Pension Valuation Checklist (Marriage Breakdown)

If the pension plan member was **NOT RETIRED** at separation, this is all the information that is required in most cases:

- Name and date of birth of the plan member
- Date of marriage
- Date of separation/valuation
- Copy of the regular annual pension statement for the year-end closest to the separation/valuation date
- Copy of the plan's standard "marriage breakdown" statement (if available)
- Status of the plan member on the date of separation (actively at work, retired, on disability leave, working at a new company, etc.)

If the member **RETIRED** prior to separation, here's what we need:

- Name and date of birth of the plan member and the spouse
- Date of marriage
- Date of separation/valuation
- Confirmation of the gross amount of pension in the year of separation (T4A slip, notice of pension amount issued at the beginning of the year, or recent "pension paystub")
- Confirmation of the form of pension elected at retirement (copy of retirement statement or copy of retirement option election package)

Occasionally, we'll need additional information. If that's the case, we will let you know.

Questions? Not sure exactly what we require? Contact us:

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