

[Your Name]
[Your Address]
[Your Phone Number]
[Your Email]

[Date]

[Plan Administrator Name]
[Pension Fund or Financial Institution Name]
[Address]

RE: Division of Retirement Benefits

Participant Name: [Full Name of Account Holder]
Account Number: [Account/Policy Number]
Case Number: [Court Case Number, if applicable]

To whom it may concern,

I am writing to formally notify you of the division of the above-referenced retirement account/pension fund pursuant to a [Divorce Decree / Separation Agreement] dated [Date of Order].

Enclosed please find a certified copy of the [Qualified Domestic Relations Order (QDRO) / Court Order] which outlines the specific distribution of assets to the Alternate Payee, [Alternate Payee Name].

As per the order, please perform the following actions:

- Calculate the specific portion or percentage of the account balance to be transferred.
- Establish a separate account for the Alternate Payee or issue a distribution as specified in the document.
- Provide confirmation once the transfer or division has been completed.

If there are additional forms required by your institution to finalize this process, or if the submitted order requires specific plan-mandated language, please notify me at your earliest convenience.

Thank you for your assistance in this matter.

Sincerely,

[Your Signature]
[Your Printed Name]

Enclosures: [List documents, e.g., Certified Copy of QDRO, Identity Verification]