[Your Name/Law Firm Name]
[Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Actuary Name]
[Actuarial Firm Name]
[Address]
[City, State, Zip Code]

RE: Marriage of [Petitioner Name] and [Respondent Name]
Case Number: [Insert Case Number]
Subject: Instruction for Pension Valuation

Dear [Actuary Name],

This office represents [Client Name] in a marital dissolution proceeding. We are requesting your services to perform a formal actuarial valuation of the following retirement benefit(s):

1. Plan Information:
Name of Plan: [Plan Name]
Plan Participant: [Participant Name]
Social Security Number: [Optional/Last 4 Digits]
Date of Birth: [Date]

2. Relevant Dates:
Date of Marriage: [Date]
Date of Separation (Cut-off Date): [Date]
Valuation Date: [Current Date or Specific Requested Date]

3. Scope of Work:
Please calculate the present value of the community/marital interest in the aforementioned plan. We require a formal report that includes:
- The total present value of the accrued benefit.
- The specific value of the community property portion using the [Time Rule / Coverture Fraction].
- A summary of the actuarial assumptions used (mortality tables, interest rates, etc.).

4. Supporting Documentation:
Enclosed please find the following documents to assist in your calculation:
- Recent Summary Plan Description (SPD).
- Benefit Statement as of [Date].
- Salary history or individual earnings record (if applicable).

5. Delivery and Billing:
Please provide the completed report by [Due Date]. Your invoice should be addressed to [Name of Party Paying] and sent to [Address/Email].

If you require any additional information or have questions regarding the specifics of this plan, please contact my office immediately.

Sincerely,

[Your Signature]

[Your Printed Name]