[Your Name/Law Firm Name]
[Address Line 1]
[Address Line 2]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Actuary Name]
[Actuarial Firm Name]
[Address Line 1]
[Address Line 2]
[City, State, Zip Code]

RE: Pension Valuation for the Estate of [Deceased Full Name] (Deceased)

Dear [Actuary Name],

I am writing to formally instruct you to provide a formal actuarial valuation of a pension interest held by the above-named decedent for the purposes of estate administration and probate filing.

1. Deceased Information:
Name: [Full Name]
Date of Birth: [Date]
Date of Death: [Date]
Social Security Number (if required): [Number]

2. Pension Plan Details:
Name of Plan: [Plan Name]
Employer: [Employer Name]
Type of Plan: [Defined Benefit / Defined Contribution / Other]
Status at Death: [Active / Retired / Deferred]

3. Scope of Work:
Please calculate the present value of the pension benefits as of the Date of Death. Specifically, we require:
- The fair market value of the interest for federal and state estate tax purposes.
- A summary of the assumptions used (discount rates, mortality tables, etc.).
- The value of any survivor benefits or lump-sum death benefits payable to the estate or beneficiaries.

4. Supporting Documents:
Attached for your review are:
- Recent pension statement/benefit estimate.

- Plan summary description (if available).
- Death certificate.

5. Timeline and Delivery:
We require the completed valuation report by [Date]. Please deliver the report in digital format to [Email Address] and [Number] hard copies to our office.

Please confirm your receipt of these instructions and provide an estimate of your fees before proceeding. If you require further information, please contact [Contact Person Name] at [Phone Number].

Sincerely,

[Your Signature]
[Your Printed Name]
[Title/Capacity, e.g., Executor / Attorney for the Estate]