[Date]

[Name of Actuary/Firm]
[Address]
[City, State, Zip Code]

RE: Letter of Instruction - Actuarial Valuation for ERISA Class Action Litigation
Case Name: [Case Name and Docket Number]
Retention Subject: Expert Analysis of [Plan Name]

Dear [Actuary Name],

This letter formally instructs you to provide actuarial services in connection with the above-referenced ERISA class action litigation. You are being retained as an expert consultant to analyze the funding, benefit calculations, and actuarial assumptions of the [Plan Name] (the "Plan").

1. Scope of Work
You are requested to perform the following tasks:

- Review the Plan Document, Summary Plan Descriptions (SPDs), and Form 5500 filings for the period of [Relevant Years].
- Evaluate the reasonableness of the actuarial assumptions used by the Plan's prior actuaries, including mortality tables, discount rates, and retirement ages.
- Calculate the impact of the alleged [fiduciary breach/improper calculation/accrual violation] on the class members' benefits.
- Prepare a preliminary report and, if necessary, a formal expert report compliant with Federal Rule of Civil Procedure 26(a)(2)(B).

2. Data and Documentation
Counsel will provide you with the following data sets:

- Participant census data (encrypted).
- Historical asset valuation reports.
- Relevant correspondence with the Department of Labor or PBGC.

3. Privilege and Confidentiality
Your work is being performed at the direction of counsel in anticipation of litigation. All communications, draft reports, and data analysis are protected by the attorney-client privilege and/or the work-product doctrine. Do not disclose any findings to third parties without express written consent from this firm.

4. Schedule
Please provide your preliminary analysis by [Date]. We anticipate the deadline for the expert disclosure to be [Date].

5. Conflict of Interest
By accepting this instruction, you confirm that your firm has performed a conflict check and has no prior or current relationship with [Defendant Name] or [Plan Sponsor] that would preclude your participation.

Please sign below to acknowledge receipt of these instructions.

Sincerely,

[Your Name/Law Firm Name]

Acknowledged by:

_____
[Actuary Name / Signature]
[Date]