[Your Name/Law Firm Name]
[Address]
[City, State, Zip Code]
[Date]

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

RE: Letter of Instruction for Pension Valuation - [Name of Trust/Estate]

Dear [Actuary Name],

I am writing to formally retain your services on behalf of [Name of Trustee], in their capacity as Trustee of the [Name of Trust]. We require a formal actuarial valuation of a pension interest to facilitate a fiduciary distribution.

1. Purpose of Valuation
The valuation is required to determine the present value of the pension benefits held by [Name of Participant/Deceased] for the purpose of [e.g., calculating a lump-sum distribution, equalizing shares among beneficiaries, or tax reporting].

2. Pension Plan Information
Name of Plan: [Plan Name]
Plan Sponsor: [Employer Name]
Participant Name: [Name]
Date of Birth: [Date]
Date of Death/Valuation Date: [Date]

3. Specific Instructions
Please provide a written report including:
- The present value of the future benefit stream as of [Valuation Date].
- The methodology and actuarial assumptions used (interest rates, mortality tables, etc.).
- A breakdown of the monthly/annual benefit amounts used in the calculation.

4. Documentation Provided
Attached are the following documents to assist in your calculation:
- [e.g., Most recent Pension Benefit Statement]
- [e.g., Summary Plan Description]
- [e.g., Trust Agreement/Joinder]

5. Timeline
We request that the completed valuation report be delivered to our office by [Date].

Please confirm your receipt of this instruction and provide an estimate of your fees before proceeding. If you require further information, please contact me at [Phone Number] or [Email].

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title/Capacity]