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

[Date]

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

RE: Pension Valuation for Pre-Trial Settlement Negotiations
Case Name: [Case Name, e.g., Smith v. Smith]
Case Reference Number: [Reference Number]

Dear [Actuary Name],

We represent [Client Name] in connection with a pending legal matter regarding [Nature of Case, e.g., Matrimonial Dissolution/Employment Dispute]. We require your formal actuarial services to value the pension interests listed below for the purpose of upcoming pre-trial settlement negotiations.

1. Subject Information
Name of Plan Participant: [Name]
Date of Birth: [Date]
Date of Marriage/Commencement of Interest: [Date]
Date of Separation/Valuation Cut-off: [Date]

2. Pension Plan Details
Plan Name: [Name of Pension Plan]
Type of Plan: [e.g., Defined Benefit / Defined Contribution]
Current Employment Status: [e.g., Active / Retired / Terminated]

3. Scope of Work
Please provide a written report determining the present value of the accrued pension benefit. We specifically request that you calculate:

- The total present value as of [Valuation Date].
- The marital/coverture portion of the benefit based on the dates provided.
- [Optional] Alternative scenarios based on retirement at ages [e.g., 60, 62, and 65].

4. Assumptions and Methodology
Please utilize standard actuarial assumptions consistent with [Specific State/Local] statutes. If

you use specific mortality tables or discount rates, please disclose these within your report. This report is intended for settlement purposes but must be robust enough for expert testimony should negotiations fail.

5. Documentation Attached
To assist in your valuation, we have enclosed:

- Latest Annual Benefit Statement.
- Summary Plan Description (SPD).
- [Other Relevant Documents].

6. Timeline and Fees
We intend to enter negotiations on [Date]. We request your preliminary findings by [Date]. Please confirm receipt of these instructions and provide an estimate of your fees before proceeding.

Thank you for your assistance in this matter.

Sincerely,

[Signature]
[Typed Name]
[Title]