



PENSION ANALYSIS CONSULTANTS, INC.

We Value Your Future®
www.pensionanalysis.com

CONSULTING SERVICES NEW REQUEST PACKET

This document is meant to be a guide to help attorneys know what they must provide to retain our services. As always, we welcome phone calls. We are glad to discuss the specifics of your case and what information we would need from you to get started.

Contents of this packet:

- Checklist detailing what we need and how to submit it;
- Request form; and
- Explanation of our requesting attorney policy.

Retention Overview

To retain our services, you must provide the information detailed in the checklist. Once we receive the request form and the retainer, we will reach out to you to schedule a call to discuss your case.

Our consulting services include:

Customized language – We draft settlement agreement language, addendums, clarifying orders, and letters specific to the retirement plans and needs of your individual cases.

Executive benefit assistance – We help you understand the complex provisions of non-qualified plans, stock options, top-hat plans, incentive plans, bonuses, and excess benefit plans which usually require a specialized approach.

Review of opposing counsel's drafted orders/settlement agreement language – We will examine the decree, benefit information, plan documents, and proposed Order and inform you of any issues that may be of concern.

Litigation assistance – We can help with your preparation from legal research to strategy and brief writing.

Only attorneys may retain our services. Although our company employs attorneys, we do not represent clients or perform any services for non-lawyers. If you are a party in a divorce and wish to use our services, please have your attorney contact our office.

CONSULTING SERVICES REQUEST FORM

A consulting service request requires a retainer of \$600. All consulting services will be charged at a rate of \$300 per hour. In the event that the request will require more than 2 hours, we will contact you for approval of additional charges.

Requesting Attorney Information

Represents: ☐ Plan Participant ☐ Alternate Payee

- Name _____
- Address, City, State, Zip _____
- Phone _____
- Email _____
- Assistant Email _____

Opposing Counsel Information

- Name _____
- Address, City, State, Zip _____
- Phone _____
- Email _____
- Assistant Email _____

Duration of the Marriage

Date of Marriage _____ Date of Divorce _____

Alternate Payee Information

- Name _____ Gender: ☐ Male ☐ Female
- Address, City, State, Zip _____
- SSN _____ DOB _____
- Role ☐ Plaintiff ☐ Defendant

Participant Information

- Name _____ Gender: ___ Male ___ Female
- Address, City, State, Zip _____
- SSN _____ DOB _____
- Role ___ Plaintiff ___ Defendant

Requesting Attorney Information

- ☐ Customized language
- ☐ Executive benefit assistance
- ☐ Review of opposing counsel's drafted orders/settlement agreement language
- ☐ Litigation assistance

Details of Request
