

RETIREMENT ASSET RELEASE FORM

I, _____, do hereby instruct _____
(Plan Participant) [name and address of benefits provider]

_____ ,
to cooperate fully with _____
(Name of attorney - address - phone #)

_____ or his/her designee and answer any and all questions relating to my pension plan or any other benefit/compensation plans in which I participate. I also request that you furnish this individual a current plan booklet and a current accrued benefits statement, and a statement as of _____, of my accrued retirement benefits including any defined contribution and (Marital Property Cut-off Date)

defined benefit plans in which I am a participant. The Defined Benefit Plan statements should detail the accrued vested benefit payable to me on my normal retirement date along with a statement of projected pension benefits, including supplemental benefits, if any, payable to me on the earliest date that I may receive them on an actuarially unreduced basis (based on my current income) and assuming continued employment to that date. If my benefit is contingent upon my job level/classification or contribution level please so state and advise what they are. Also, please provide a statement showing my service computation date (first day of employment), dates of all breaks in service (if any), my current salary and my salary for the past five years, the legal names of the plans in which I participate and their addresses and the name, address and telephone number of the person to be contacted if additional information is needed. I authorize that person to answer all questions incident to this request. The Defined Contribution Plan statements should show my current plan balances as well as the balances on _____.
(Marital Property Cut-off Date)

Today's Date

Signature of Plan Participant

Date of Birth

Social Security #

Witness

Witness