

Economic Horizons, Inc.

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Pension Valuation Form

We will need the following information:

Plan Participant's Name: _____

Name of Participant's Employer: _____

Plan Participant's Date of Birth: _____

Plan Participant's Date of Marriage: _____

Date of employment: _____

Is the Plan Participant currently employed? Yes or No If yes, what does the current plan statement indicate the retirement monthly benefit to be? \$ _____. Is this amount payable at age 65 or the amount earned up through the date of the plan statement?

Or

Is the Plan Participant in Pay Status (retired)? Yes or No If yes, what is the current monthly retirement check amount? \$ _____.
Is there a COLA benefit? Yes or No

Your Contact Information: _____
