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Supplemental Intake Form

(Please respond to all questions related to the plan)

Note: Please do not list plan already listed on Intake Form

Plan 1:

Name of Plan Participant: _____

Date of Plan Entry: _____ Date of Termination / Retirement: _____

Name of Retirement Plan: _____

(Defined Contribution Plans) Were there contributions prior to marriage? Yes / No

(Defined Contribution Plans) Were there contributions after separation? Yes / No

Is participant currently receiving monthly benefits? Yes / No Monthly benefit amount \$ _____

(Pensions) What form of payment was elected at retirement? (e.g. Single Life Annuity, 50% Joint and Survivor benefit, etc.)

Plan 2:

Name of Plan Participant: _____

Date of Plan Entry: _____ Date of Termination / Retirement: _____

Name of Retirement Plan: _____

(Defined Contribution Plans) Were there contributions prior to marriage? Yes / No

(Defined Contribution Plans) Were there contributions after separation? Yes / No

Is participant currently receiving monthly benefits? Yes / No Monthly benefit amount \$ _____

(Pensions) What form of payment was elected at retirement? (e.g. Single Life Annuity, 50% Joint and Survivor benefit, etc.)

Plan 3:

Name of Plan Participant: _____

Date of Plan Entry: _____ Date of Termination / Retirement: _____

Name of Retirement Plan: _____

(Defined Contribution Plans) Were there contributions prior to marriage? Yes / No

(Defined Contribution Plans) Were there contributions after separation? Yes / No

Is participant currently receiving monthly benefits? Yes / No Monthly benefit amount \$ _____

(Pensions) What form of payment was elected at retirement? (e.g. Single Life Annuity, 50% Joint and Survivor benefit, etc.)

Plan 4:

Name of Plan Participant: _____

Date of Plan Entry: _____ Date of Termination / Retirement: _____

Name of Retirement Plan: _____

(Defined Contribution Plans) Were there contributions prior to marriage? Yes / No

(Defined Contribution Plans) Were there contributions after separation? Yes / No

Is participant currently receiving monthly benefits? Yes / No Monthly benefit amount \$ _____

(Pensions) What form of payment was elected at retirement? (e.g. Single Life Annuity, 50% Joint and Survivor benefit, etc.)
