



Statement of Family Law Value Retired Member with a Defined Benefit Pension FSCO Family Law Form 4E

Approved by the Superintendent of Financial Services pursuant to
the *Pension Benefits Act*, R.S.O. 1990, c.P.8

Read the User Guide before completing this form.

This form is to be completed by the pension plan administrator (Plan Administrator).

This form applies to a pension plan member if the first installment of his/her pension was due (Retired Member) on or before the Family Law Valuation Date.

This Statement of Family Law Value is a Statement of Imputed Value in the Ontario *Pension Benefits Act*. This form may be used as of January 1, 2013, and must be used as of July 1, 2013.

Information for the Retired Member and the Spouse/Former Spouse of the Retired Member

The Family Law Value that is specified under **Part A** of this Statement is the value of the pension that relates to the period of the spousal relationship (married or common-law) for a Retired Member and the spouse/former spouse of the Retired Member. If the Retired Member and his/her former spouse proceed with the division of the pension (Family Law Value), the former spouse of the Retired Member must provide the Plan Administrator with a certified copy of a court order, family arbitration award or domestic contract that was made on or after January 1, 2012, and provides for the division of the Retired Member's pension. The information contained in the court order, family arbitration award or domestic contract must **clearly identify** the former spouse's share of the pension and the Family Law Valuation Date. The maximum amount that can be paid to the former spouse of the Retired Member is specified under **Part A** of this Statement.

The former spouse of the Retired Member may request the division and payment of his/her share of the pension by completing an **Application to Divide a Retired Member's Pension (FSCO Family Law Form 6)**, which must be accompanied by a certified copy of a court order, family arbitration award or domestic contract providing for the division of the pension, in addition to other documents as required by the Plan Administrator.

IMPORTANT: If the Retired Member's pension is paid out in full between the time this Statement is issued and the time the former spouse of the Retired Member gives the completed **Application to Divide a Retired Member's Pension (FSCO Family Law Form 6)** to the Plan Administrator, the Plan Administrator is not required to divide and pay the former spouse any amount related to his/her share of the pension.

For Plan
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Use

**Part A
Family Law Value**

Name of the Retired Member	Last Name	First Name and Initials	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No
Name of the Spouse/Former Spouse	Last Name	First Name and Initials	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A of Application for Family Law Value (FSCO Family Law Form 1) was filed with two proposed Family Law Valuation Dates. THIS STATEMENT SETS OUT ONE OF THE TWO (2) PROPOSED FAMILY LAW VALUES. Yes No

The starting date of the spousal relationship is: _____ (yyyy/mm/dd)

The starting date is based on:
 date of marriage date when the spouses/former spouses started living together in a common-law relationship date that was jointly chosen by the spouses/former spouses date specified in a court order or family arbitration award

The **Family Law Valuation Date** (Separation Date) is: _____ (yyyy/mm/dd)

Family Law Value Summary

The **Family Law Value** of the Retired Member's **pension** [includes bridging/supplemental benefit and surplus (if any) but excludes the spouse's/former spouse's **survivor benefit**] as of the Family Law Valuation Date is:

\$ _____

The **Family Law Value** of the spouse's/former spouse's **survivor benefit** as of the Family Law Valuation Date is [or N/A]:

\$ _____ (enter 0 if N/A)

Pension Summary

The Retired Member's **lifetime pension** is payable for the lifetime of the Retired Member and stops on the death of the Retired Member.

The Retired Member's monthly annual **lifetime pension** is:

from the Family Law Valuation Date to age 65 \$ _____ from age 65 to the date of death \$ _____

The Retired Member's **bridging/supplemental benefit** is a temporary benefit.

The Retired Member's monthly annual **bridging/supplemental benefit** [or N/A (enter 0 if N/A)]:

from the Family Law Valuation Date to age _____ is \$ _____

There is second bridging/supplemental benefit period [or N/A (enter 0 if N/A)]:

from age _____ to _____ is \$ _____

The **maximum** monthly annual **lifetime pension** that may be paid to the former spouse of the Retired Member from the pension plan is:

from the Family Law Valuation Date to age 65 \$ _____ from age 65 to the date of death \$ _____

or a maximum of _____ % of each pension installment (cannot exceed 50% of the pension earned during the period of the spousal relationship).

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The **maximum** monthly annual **bridging/supplemental benefit** that may be paid to the former spouse of the Retired Member from the pension plan [or N/A (enter 0 if N/A)]:

from the Family Law Valuation Date to age _____ is \$ _____

and, the **maximum** monthly annual **bridging/supplemental benefit** that may be paid to the former spouse of the Retired Member from the pension plan for the second bridging/supplemental benefit period [or N/A (enter 0 if N/A)]:

from age _____ to _____ is \$ _____

or a maximum of _____ % of each installment of the bridging/supplemental benefit (cannot exceed 50% of the bridging/supplemental benefit earned during the period of the spousal relationship).

Summary of Other Provisions that Apply to the Pension

Indexation:	The pension plan provides post retirement indexation <input type="checkbox"/> Yes <input type="checkbox"/> No
Post Retirement Death Benefit:	<p>Survivor benefit payable to the spouse/former spouse or <input type="checkbox"/> N/A (If N/A do not complete)</p> <p>Bridging/supplemental benefit <input type="checkbox"/> Yes <input type="checkbox"/> No Guaranteed payments <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Following the death of the Retired Member:</p> <ul style="list-style-type: none"> • The survivor benefit is _____ % of the Retired Member's lifetime pension which is payable for the lifetime of the spouse/former spouse of the Retired Member. • The number of remaining guaranteed payments of the Retired Member's lifetime pension (before reduction for survivor benefit applies) from the Family Law Valuation Date is: _____. • The spouse's/former spouse's share of the Retired Member's bridging/supplemental benefit is paid for a minimum of _____ payments.
	<p>No survivor benefit payable to the spouse/former spouse or <input type="checkbox"/> N/A (If N/A do not complete)</p> <p>Bridging/supplemental benefit <input type="checkbox"/> Yes <input type="checkbox"/> No Guaranteed payments <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Following the death of the Retired Member:</p> <ul style="list-style-type: none"> • The spouse's/former spouse's share of the Retired Member's lifetime pension is paid for a minimum of _____ payments. • The spouse's/former spouse's share of the Retired Member's bridging/supplemental benefit is paid for a minimum of _____ payments.

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**Part B
Pension Plan Information**

Name of Pension Plan		Pension Plan Registration Number
Plan Administrator		
Mailing Address (Street Number and Name)		Suite/Floor No.
City	Province	Postal Code
Telephone Number ()	Fax Number ()	Website Address (if available)

**Part C
Retired Member Information**

Last Name	First Name and Initials	Date of Birth (yyyy/mm/dd)
Plan Member's Employee/Pension Plan Identification Number		

Contact Person Information for the Retired Member

Yes N/A

Last Name	First Name and Initials	<input type="checkbox"/> Lawyer <input type="checkbox"/> Other <input type="checkbox"/> Power of Attorney
Name of Company/Firm (if applicable)		
Mailing Address (Street Number and Name)		Suite/Floor No.
City	Province	Postal Code
Telephone Number (Main) ()	Telephone Number (Other) ()	Fax Number ()
Contact Person E-Mail Address (if known)		

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Part D
Spouse/Former Spouse of Retired Member Information

Last Name	First Name and Initials	Date of Birth (yyyy/mm/dd)
This person is the spouse on record who is entitled to a survivor benefit upon the death of the Retired Member		<input type="checkbox"/> Yes <input type="checkbox"/> No
If No, check one of the following that applies:		
<input type="checkbox"/> There is no survivor benefit payable on the death of the Retired Member.		
<input type="checkbox"/> There is a survivor benefit payable on the death of the Retired Member but this is not the spouse on record who is entitled to this survivor benefit.		

Contact Person Information for the Spouse/Former Spouse of the Retired Member

Yes N/A

Last Name	First Name and Initials	<input type="checkbox"/> Lawyer <input type="checkbox"/> Other
		<input type="checkbox"/> Power of Attorney
Name of Company/Firm (if applicable)		
Mailing Address (Street Number and Name)		Suite/Floor No.
City	Province	Postal Code
Telephone Number (Main) ()	Telephone Number (Other) ()	Fax Number ()
Contact Person E-Mail Address (if known)		

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Part E

Options for the Former Spouse of the Retired Member to Divide the Pension

The following options for the division of pension are available to the former spouse of the Retired Member:

- Division of each installment of the Retired Member's pension:**
 - (i) division of each installment of the lifetime pension
 - (ii) division of each installment of the bridging/supplemental benefit (if any)

- Transfer to a Registered Retirement Savings Plan (RRSP), a Registered Retirement Income Fund (RRIF) or cash payment.** This option is only available for payment resulting from shortened life expectancy of the Retired Member and/or payment of surplus.

- The Retired Member's pension cannot be divided because:**

- Combination option (available only if the pension plan provides for this option and the former spouse has waived the survivor benefit).** The former spouse's pension is paid independently from the pension payable to the retired member. If this option is selected, the former spouse must waive the survivor benefit by completing **Part G** of the **Application to Divide a Retired Member's Pension (FSCO Family Law Form 6)**. The amount of pension payable to the former spouse is the amount that can be provided by the former spouse's share of the Family Law Value plus the former spouse's Family Law Value of the survivor benefit.

The **maximum amount** of the **Family Law Value** of the Retired Member's **pension** [includes bridging/supplemental benefit and surplus (if any) but excludes the former spouse's **survivor benefit**] that may be used to calculate the former spouse's combination option pension as of the Family Law Valuation Date is:

\$ _____

The estimated amount of the pension that can be provided by the maximum amount of the former spouse's share of the Family Law Value plus the former spouse's Family Law Value of the survivor benefit that is payable from the Family Law Valuation Date for the lifetime of the former spouse is:

\$ _____ * monthly
 annual

***Note: This amount is an estimate only and is not guaranteed.**

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Part F
Certification by the Plan Administrator or Plan Administrator's Agent or Representative

A completed **Application for Family Law Value (FSCO Family Law Form 1)**, including all required documents and the fee (if any) was received on:

	(yyyy/mm/dd)
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I confirm the following:

- The pension plan provides only a defined benefit to the Retired Member.
- The Retired Member applied for the withdrawal of his/her pension in circumstances of shortened life expectancy and the conditions that are specified under Ontario Regulation 287/11 (Family Law Matters) have been met [or, N/A].
- I have completed **Appendices A, D and E** of this Statement.
- I have completed **Appendix B**, or I have attached a separate sheet containing the required information relating to the plan provisions.
- I have completed **Appendix C**, or I have attached a separate sheet containing the required information relating to the actuarial assumptions.

I certify the following:

- I am the duly authorized Plan Administrator, or I am the duly authorized agent or representative of the Plan Administrator

I further certify that the information shown on this Statement (including all Appendices and any attachments) is, to the best of my knowledge, accurate and based on the information that was provided by the applicant in his/her **Application for Family Law Value (FSCO Family Law Form 1)** and the information contained in the pension plan records that pertain to the Retired Member.

 Signature of Plan Administrator or Plan Administrator's authorized agent or representative

 Name of Plan Administrator or Plan Administrator's authorized agent or representative (printed)

 Dated (yyyy/mm/dd)

Information about the Plan Administrator's authorized agent or representative (if applicable)

Firm/Company Name			
Mailing Address (Street Number and Name)			Suite/Floor No.
City	Province	Postal Code	Telephone Number ()
E-Mail Address			

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Next Steps

No Division

If the Retired Member and the spouse/former spouse of the Retired Member **will not be dividing the pension**, they may jointly complete the **No Division of Family Law Value/Pension Assets (FSCO Family Law Form 7)** and give it to the Plan Administrator.

Division of the Pension

If the **pension is to be divided**, the former spouse of the Retired Member must complete and send an **Application to Divide a Retired Member's Pension (FSCO Family Law Form 6)** to the Plan Administrator and include the following information:

- A certified copy of the court order, family arbitration award or domestic contract made on or after January 1, 2012, under the Ontario *Family Law Act* that provides for the division of the Retired Member's pension and clearly specifies:
 - (i) the Family Law Valuation Date;
 - (ii) the amount or the percentage of Retired Member's lifetime pension, bridging/supplemental benefit (if any) that is to be paid to the former spouse of the Retired Member;
 - (iii) the payments that are to be made to the Retired Member from the pension plan in the event the former spouse dies before the Retired Member;
 - (iv) the payments that are to be made to the former spouse from the pension plan in the event the Retired Member dies before the former spouse; and
 - (v) whether indexation will also be applied to the former spouse's pension payments if the pension plan provides for the Indexation (see "**Summary of Other Provisions that Apply to the Pension**" under **Part A** of this form for this information).

- Other information required by the Plan Administrator as noted below or attached (see attached).

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Appendix A

Plan Membership, Employment, Additional Voluntary Contribution and Excess Member Contribution Information as of the Family Law Valuation Date

Plan Membership and Employment Information as of the Family Law Valuation Date

The Retired Member joined the pension plan on:	_____	(yyyy/mm/dd)
The Retired Member commenced payment of his/her pension as of:	_____	(yyyy/mm/dd) or <input type="checkbox"/> N/A
Total credited service accrued by the Retired Member during his/her entire period of employment or plan membership as of the Family Law Valuation Date:	_____	
Total credited service accrued by the Retired Member during his/her spousal relationship period:	_____	

Additional Voluntary Contributions (AVCs) Information as of the Family Law Valuation Date

The Retired Member has AVCs in the pension plan as of the Family Law Valuation Date.	<input type="checkbox"/> Yes (if Yes, complete information below) or <input type="checkbox"/> N/A
Total AVCs as of the Family Law Valuation Date, including interest/investment earnings remaining in the pension plan:	\$ _____

Excess Member Contributions as of the Family Law Valuation Date

The Retired Member has excess member contributions in the pension plan as of the Family Law Valuation Date.	<input type="checkbox"/> Yes (if Yes, complete information below) or <input type="checkbox"/> N/A
Total excess member contributions, including interest/investment earnings remaining in the pension plan:	\$ _____

NOTE:

- Additional Voluntary Contributions (AVCs) are optional contributions that a pension plan member may make beyond those that are required to be made by the pension plan member under the pension plan. The terms of the pension plan specify whether AVCs are allowed and how they are to be paid out. **AVCs are not included in the Family Law Value** set out in **Part A** of this Statement.
- Excess member contributions arise in cases where a pension plan member's required contributions to the pension plan made on or after January 1, 1987, or an earlier date specified in the pension plan, and interest/investment earnings on those contributions exceed one-half of the commuted value of his/her pension earned after that date. The Retired Member's **excess member contributions are not included in the Family Law Value** set out in **Part A** of this Statement.

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Appendix B

Explanation of Pension Plan Provisions that Apply to the Retired Member as of the Family Law Valuation Date

Information about the pension plan is attached to this Statement.

Plan Provisions	Provide Details (if applicable)
Form of pension elected by the retired member	
Indexation (post-retirement) <input type="checkbox"/> N/A	
Canada Pension Plan/Old Age Security offset formula <input type="checkbox"/> N/A	
Canada Pension Plan/Old Age Security integration formula (and average YMPE used in the calculation) <input type="checkbox"/> N/A	
Ancillary benefits (bridging, supplemental, etc.) <input type="checkbox"/> N/A	
Other relevant provisions <input type="checkbox"/> N/A	

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Appendix C

Actuarial Assumptions Used in the Calculation of the Family Law Value as of the Family Law Valuation Date

Actuarial assumptions used in the calculation of the Family Law Value are attached to this Statement.

Assumptions based on section 3500 of the <i>Canadian Institute of Actuaries Standards of Practice</i>	Assumptions
Non-indexed interest rate(s)	
Mortality table: <input type="checkbox"/> unisex and/or <input type="checkbox"/> sex-distinct (pre-87 service only)	
Indexed interest rate(s) <input type="checkbox"/> N/A	
Inflation rate(s) <input type="checkbox"/> N/A	
Other relevant assumptions <input type="checkbox"/> N/A	

Shortened Life Expectancy

A shortened life expectancy application has been filed and the conditions that are specified under Ontario Regulation 287/11 (Family Law Matters) have been met. Yes No

If "Yes", actuarial assumptions used in the calculation of the shortened life expectancy Family Law Value are provided below:

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Appendix D

Full or Partial Plan Wind Up/Surplus/Plan Amendments

Information about the full or partial wind up of the pension plan

The pension plan has been fully or partially wound up, the Retired Member is included in the full or partial wind up group and the effective date of the full or partial wind up is **on or before** the date when this Statement is issued. If **Yes**, Yes N/A complete the information below.

The pension plan was wound up in full or in part

Effective date of the full or partial wind up of the pension plan is: _____ (yyyy/mm/dd)

The full or partial wind up report is pending approval from the Superintendent of Financial Services Yes No, report has been approved

The Retired Member's pension will be reduced as a result of the wind up Yes No Unknown

The pension plan is covered by the Pension Benefits Guarantee Fund Yes No

Surplus Application Made On or Before the Family Law Valuation Date

The Retired Member is entitled to receive a share of surplus from the pension plan, which is not included in Family Law Value (see **Appendix E**). If **Yes**, provide relevant details of the surplus application (e.g. information about the surplus sharing agreement, etc.) Yes N/A

Pension Plan Amendments Before the Family Law Valuation Date

The Retired Member belongs to a class of employees that received (or will be receiving) payment(s) resulting from amendment(s) to the pension plan related to cost of living adjustments during the last three fiscal years of the pension plan before the Family Law Valuation Date. If **Yes**, provide an explanation of the amendment(s) [e.g. date when amendment was made, how much the Retired Member received (or will receive), etc.]. Yes N/A

Year 1	
Year 2	
Year 3	

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Appendix E

Worksheet for Family Law Value Calculations

Part 1 – Retired Member Information

Step 1 – Calculation of Preliminary Value as of the Family Law Valuation Date (Retired Member)

NOTE:

- The **Preliminary Value** in **Part 1** is the total value of the pension accrued by the Retired Member during the period of his/her membership in the pension plan as of the Family Law Valuation Date. It has not been adjusted to reflect the period of the spousal relationship.
- Note that additional voluntary contributions or excess member contributions (see **Appendix A** of this Statement) are not included in the Preliminary Value.

Calculation 1 N/A

Do not complete **Calculation 1** if the pension plan was **wound up in full or in part**, the effective date of the wind up is **on or before** the **Family Law Valuation Date**, and the Retired Member is included in this wind up group. Instead, complete **Calculation 2**.

Information about the Retired Member's Accrued Pension as of the Family Law Valuation Date for Calculation 1

Accrued lifetime pension as of the Family Law Valuation Date <input type="checkbox"/> monthly or <input type="checkbox"/> annual	\$	
Accrued bridging/supplemental benefit as of the Family Law Valuation Date <input type="checkbox"/> monthly or <input type="checkbox"/> annual [or <input type="checkbox"/> N/A]	\$	(enter 0 if not applicable)
Canada Pension Plan reduction at age 65 <input type="checkbox"/> monthly <input type="checkbox"/> annual [or <input type="checkbox"/> N/A]	\$	(enter 0 if not applicable)
Retired Member's age on the Family Law Valuation Date		

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Information about the Retired Member's Preliminary Value as of the Family Law Valuation Date

Preliminary Value of lifetime pension		
The commuted value of the Retired Member's pension (including survivor benefit, if any) as of the Family Law Valuation Date	\$	
Less: commuted value of the spouse's/former spouse's survivor benefit related to the Retired Member's pension as of the Family Law Valuation Date [or <input type="checkbox"/> N/A]	\$	(enter 0 if not applicable)
Preliminary Value (lifetime pension)	\$	= G(lifetime)
Preliminary Value of bridging/supplemental benefit <input type="checkbox"/> N/A (If N/A, do not complete this part)		
The commuted value of bridging/supplemental benefit as of the Family Law Valuation Date	\$	
Less: commuted value of the spouse's/former spouse's survivor benefit related to the bridging/supplemental benefit as of the Family Law Valuation Date [or <input type="checkbox"/> N/A]	\$	(enter 0 if not applicable)
Preliminary Value (bridging/supplemental)		= G (bridging/supplemental)
Surplus payable <input type="checkbox"/> N/A or <input type="checkbox"/> unknown (If N/A or unknown do not complete this part)		
Surplus payable = Preliminary Value (surplus)	\$	= G(surplus)
Total Preliminary Value as of the Family Law Valuation Date		
G(lifetime)+ G(bridging/supplemental) + G(surplus)	\$	= Total Preliminary Value

Calculation 2 N/A

A full or partial wind up of the pension plan was declared before this **Statement of Family Law Value (FSCO Family Law Form 4E)** has been sent by the Plan Administrator to the Retired Member and his/her spouse/former spouse. The Retired Member is included in the full or partial wind up group and the effective date of the wind up is **on or before** the Family Law Valuation Date.

Information about the Retired Member's Accrued Pension as of the Full or Partial Wind Up Date for Calculation 2

Accrued lifetime pension as of the wind-up date <input type="checkbox"/> monthly or <input type="checkbox"/> annual	\$	
Accrued bridging/supplemental benefit as of the wind-up date <input type="checkbox"/> monthly or <input type="checkbox"/> annual or <input type="checkbox"/> N/A	\$	(enter 0 if not applicable)
Canada Pension Plan reduction at age 65 or <input type="checkbox"/> N/A	\$	(enter 0 if not applicable)
Retired Member's age on the Family Law Valuation Date		

Information about the Retired Member's Preliminary Value as of the Family Law Valuation Date

Preliminary Value of lifetime pension		
Wind up value of the lifetime pension as of the full or partial wind up date	\$	
Plus: accumulated interest on the lifetime pension from the full or partial wind up date to the Family Law Valuation Date	\$	
Preliminary Value (lifetime pension)	\$	= G(lifetime)

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Information about the Retired Member's Preliminary Value as of the Family Law Valuation Date

Preliminary Value of bridging/supplemental benefit <input type="checkbox"/> N/A (If N/A, do not complete this part)		
Wind up value of the bridging/supplemental benefit as of the full or partial wind up date	\$	
Plus: accumulated interest on the bridging/supplemental benefit from the full or partial wind up date to the Family Law Valuation Date	\$	
Preliminary Value (bridging/supplemental benefit)	\$	= G (bridging /supplemental)
Surplus payable <input type="checkbox"/> N/A or <input type="checkbox"/> unknown (If N/A or unknown do not complete this part)		
Surplus payable = Preliminary Value (surplus)	\$	= G(surplus)
Total Preliminary Value as of the Family Law Valuation Date		
G(lifetime)+ G(bridging/supplemental) + G(surplus)	\$	= Total Preliminary Value

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Step 2 – Calculation of Family Law Value as of the Family Law Valuation Date (Retired Member)

NOTE:

- The **Family Law Value** in **Part 1** is the portion of the **Preliminary Value** that relates to the period of the spousal relationship (married or common-law) as of the Family Law Valuation Date.
- The Family Law Value is the “imputed value” in the Ontario *Pension Benefits Act*.

Family Law Value of lifetime pension

The Preliminary Value calculated under Step 1 above = G(lifetime)	\$	_____
Total credited service accrued by the Retired Member during his/her spousal relationship period (i.e. beginning on the starting date and ending on the Family Law Valuation Date) = H		_____
Total credited service accrued by the Retired Member during his/her entire period of employment or plan membership as of the Family Law Valuation Date = J		_____
Family Law Value formula = G(lifetime) x H/J* *H/J cannot exceed 1	\$	_____ = Family Law Value (lifetime pension)

Family Law Value of bridging/supplemental benefit or N/A (if N/A do not complete this part)

The Preliminary Value calculated under Step 1 above = G(bridging/supplemental)	\$	_____
Total credited service accrued by the Retired Member during his/her spousal relationship period (i.e. beginning on the starting date and ending on the Family Law Valuation Date) = H		_____
Total credited service accrued by the Retired Member during his/her entire period of employment or plan membership as of the Family Law Valuation Date = J		_____
Family Law Value formula = G(bridging/supplemental) x H/J* *H/J cannot exceed 1	\$	_____ = Family Law Value (bridging/supplemental)

Family Law Value of surplus assets N/A or unknown (If N/A or unknown do not complete this part)

The Preliminary Value calculated under Step 1 above = G(surplus)	\$	_____
Total credited service accrued by the Retired Member during his/her spousal relationship period (i.e. beginning on the starting date and ending on the Family Law Valuation Date) = H		_____
Total credited service accrued by the Retired Member during his/her entire period of employment or plan membership as of the Family Law Valuation Date = J		_____
Family Law Value formula = G(surplus) x H/J* *H/J cannot exceed 1	\$	_____ Family Law Value (surplus)

Total Family Law Value as of the Family Law Valuation Date

Family Law Value (lifetime pension) + Family Law Value (bridging/supplemental) + Family Law Value (surplus)	\$	_____ = Total Family Law Value
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**Step 3 - Maximum Amount that May Be Paid to the Former Spouse
of the Retired Member as of the Family Law Valuation Date**

Family Law Value Summary for the Combination Option N/A

The share of the Family Law Value payable to the former spouse of the Retired Member **cannot exceed 50%** of the Family Law Value calculated under **Step 2** above. The **maximum amount** of the **Family Law Value** that may be used to calculate the former spouse's combination option pension is:

\$ _____ for the **lifetime pension**

\$ _____ for the **bridging/supplemental benefit** (enter 0 if N/A)

\$ _____ for the **surplus** (enter 0 if N/A)

Pension Summary

The **maximum** monthly annual **lifetime pension** that may be paid to the former spouse of the Retired Member from the pension plan is:

from the Family Law Valuation Date to age 65 \$ _____ from age 65 to the date of death \$ _____

or a maximum of _____ % of each pension installment (cannot exceed 50% of the pension earned during the period of the spousal relationship).

The **maximum** monthly annual **bridging/supplemental benefit** that may be paid to the former spouse of the Retired Member from the pension plan [or N/A (enter 0 if N/A)]:

from the Family Law Valuation Date to age _____ is \$ _____

and, the **maximum** monthly annual **bridging/supplemental benefit** that may be paid to the former spouse of the Retired Member from the pension plan for the second bridging/supplemental benefit period [or N/A (enter 0 if N/A)]:

from age _____ to _____ is \$ _____

or a maximum of _____ % of each installment of the bridging/supplemental benefit (cannot exceed 50% of the bridging/supplemental benefit earned during the period of the spousal relationship).

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Part 2 – Spouse/Former Spouse of the Retired Member Information

**Step 1 – Preliminary Value as of the Family Law Valuation Date
(Spouse/Former Spouse of the Retired Member)**

NOTE:

The **Preliminary Value** in **Part 2** is the commuted value of the survivor benefit that is payable to the spouse/former spouse of the Retired Member upon the death of the Retired Member as of the Family Law Valuation Date.

The **Preliminary Value** of the spouse's/former spouse's **survivor benefit** as of the Family Law Valuation Date is [or N/A]:

\$ _____ (enter 0 if N/A)

**Step 2 – Family Law Value as of the Family Law Valuation Date
(Spouse/Former Spouse of the Retired Member)**

NOTE:

The **Family Law Value** in **Part 2** is **equal to the Preliminary Value** of the survivor benefit that is payable to the spouse/former spouse of the Retired Member upon the death of the Retired Member as of the Family Law Valuation Date.

The **Family Law Value** of the spouse's/former spouse's **survivor benefit** as of the Family Law Valuation Date is [or N/A]:

\$ _____ (enter 0 if N/A)

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Use**