



INFORMATION REQUIRED FOR *Pension Valuations for Injury and Fatality Cases* *

- Pension member's date of entry into pension plan.
- Type of pension plan: defined benefit, defined contribution, money purchase plan.
- Date of pension member's first pension plan contribution.
- Benefit formula or determination of annual pension benefits upon date of retirement.
- Years of pensionable service (may be different from years of employment).
- Details on prior service purchase (if applicable): how many years of service were purchased, and how much was paid to purchase it.
- Most current figure of the pension member's contributions *and* interest to the pension.
- Most recent YEAR-END member statement from pension plan
- "Pensionable earnings" from date of commencement to the present (these figures could be different from "employment earnings" if certain components of pay are excluded from pension calculation (i.e., commission pay, bonuses). Obtain from pension administrator or year-end statements.
- Cost-of-living increases historically applied to pension payments in pay, or clause promising indexation increases upon retirement.
- When does the pensioner plan to retire? Is there a "factor" at which the 'unreduced' pension age is achieved?
Signed authorization from pension plan member to contact pension administrator.
- RRSP portfolio amount at current date (for tax rate at retirement).

* Brown Economic does not value pensions in marriage breakdown cases – only in civil litigation involving interrupted earnings due to negligence of a 3rd party.

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