

**PENSION VALUATIONS (FOR PERSONAL INJURY CASES)
DOCUMENTS & INFORMATION REQUIRED**

1. The individual's date of birth
2. Anticipated date of retirement, both absent the accident and as a result of the accident
3. Union affiliation, job classification/title, and/or job code, if any
4. Name of the pension plan (e.g., IWA, RCMP, Superannuation - Federal)
5. The individual's hire date and date of entry into the pension plan
6. Is the individual employed full-time or part-time? If employed part-time, how many hours per week does the individual work? How many hours per week is considered full-time?
7. The individual's year-end pension statements starting from the year prior to the accident and for each subsequent year up to the valuation date
8. If the individual is no longer able to work, and has withdrawn from the paid labour force, any statement showing what their pension entitlement would be if they retired at the valuation date, or deferred the pension to a later date
9. If the individual is a member of the Superannuation plan, a copy of the "Integrated Pension Administration System Personal Profile" will provide us with most of the information which we require
10. A current copy of the pension plan benefit booklet containing descriptions of the pensions plan and pension benefit formulae
11. A current copy of the individual's pay scales, if applicable, from the accident date to the valuation date
12. The name and contact telephone number of the pension plan administrator
13. If required, signed authorization from the individual to allow the plan administrator to release information and/or documents.