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Retirement Data Sheet

(i.e. 401(k), 403(b), IRA, Roth IRA)

Case Name	
County	
Case Number	
Date of Marriage	
Date of Separation (H)	
Date of Separation (W)	

Participant's Name	
Participant's Date of Birth	
Financial Institution	
Account Number	
Type (i.e. 401(k), 403(b), IRA)	

Frequency of Contributions: (weekly, bi-weekly, semi-monthly, monthly, annually)	
Are contributions deducted from payroll? • If yes, are contributions a fixed dollar amount or a % of your pay?	
What is the contribution amount or percentage?	
Were contributions made after separation?	
Was this account established from a prior retirement account? • If yes, please identify the account.	
Were there any loans or premature distributions? • If yes, please provide the date and amount of the loan/distribution.	
Employer Matching or Contributions (if IRA, skip items below):	
Is there a Employer Matching / Contributions program? • If yes, how much does the employer match or contribute?	
Is there a vesting period? • If yes, what is the vesting schedule?	

To prepare the retirement analysis, statements from the Date of Marriage
(if opened after DOM, then from inception of the account) through current is required.