



P O L L O C K &  
G A L B R A I T H  
C O N S U L T I N G  
A C T U A R I E S

## **FAMILY LAW**

### **INFORMATION REQUIRED**

#### **PENSIONS**

- Dates of birth of both parties.
- Jurisdiction involved e.g. Scotland, England etc.
- Copies of all pension related correspondence and valuations on file.
- Copies of any reports from other experts.
- Dates of marriage and separation (if in Scotland).
- Signed letters of authority enabling contact to be made with any pension schemes.
- Whether pension sharing is intended, and if so, the objective e.g. the transfer of a specific amount of value or an income based target.

#### **SHARE OPTIONS**

- Documentation for any share option, 'sharesave' or Long Term Incentive arrangements.
- Details of contributions being made.
- Details of vesting conditions.
- Details of option exercise prices, terms etc.
- Signed letters of authority enabling contact to be made with the scheme administrators.

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