



Actuarial Services re Valuation of Pensions in the Event of Marriage Breakdown

The following fees take effect for new work accepted on or after January 1, 2013.

Defined Benefit Pension Plans – Single Valuation

- Option 1. Preparation of a written letter report suitable for court purposes, with a summary of the results of my calculations, the data and assumptions used in my calculations, pre and post-tax settlement values, and actuarial certification. Fees: \$850 plus GST.
- Option 2. Preparation of a written letter report with a summary of the results of my calculations, the data and assumptions used in my calculations, pre and post-tax settlement values, and actuarial certification. Fees: \$650 plus GST.
- Option 3. Participation in a telephone call no longer than 3/4 hour in duration. Fees: \$500 plus GST.

Defined Benefit Pension Plans – Two Valuations

- Option 4. Preparation of a written letter report suitable for court purposes, with a summary of the results of my calculations for both spouses, the data and assumptions used in my calculations, pre and post-tax settlement values, comparison of lump sum capitalized values, and actuarial certification. Fees: \$1,600 plus GST.
- Option 5. Preparation of a written letter report with a summary of the results of my calculations, the data and assumptions used in my calculations, pre and post-tax settlement values, and actuarial certification. Fees: \$1,200 plus GST.
- Option 6. Participation in a telephone call no longer than 3/4 hour in duration. Fees: \$850 plus GST.

Matured Pension Valuation

- Option 7. Same options as above. Fees will be reduced by 40%.

Valuation of RRSP or Defined Contribution Plan Assets

- Option 8. Written letter report with a summary of the results of my calculations, the data and assumptions used in my calculations, pre-tax settlement values, and actuarial certification. Suitable for presentation at a court hearing. Fees: \$450 per plan account.

Additional Calculations

- Option 9. For a valuation based upon a different date of entitlement or separation. Additional fee of 25% of the above fees.
- Option 10. For preparation of additional copies of my report e.g. for spouse's legal counsel. Additional fee of \$100 per report.
- Option 11. Other actuarial services. Fees based on hourly rate of \$300.

Please call Rose Wong at 604 266-2445 or email at dc@demner.com