

REQUEST FOR SUPERANNUATION VALUATION

UNDER NEW ZEALAND LEGISLATION (MATRIMONIAL PROPERTY ACT / PROPERTY RELATIONSHIPS ACT)

Commissioning Solicitor (responsible for paying our fee)

Name:	
Firm:	
Phone:	Fax:
Email:	Date report required:
Address report to be sent to:	

Valuation Data

Member name:	
Spouse or partner name:	
Superannuation scheme name:	
Date joined scheme:	Date retired or left scheme (if applicable):
Member birth date:	Spouse/partner birth date:
Date of marriage:	Date of first cohabitation:
Date of separation:	Valuation date (if other than separation date):

Other Documentation we require (please attach or forward as appropriate)

The membership details of the scheme, including:

- the member's most recent benefit statement(s)
- pension increase letters
- any other recent correspondence from the scheme

The rules of the scheme including (where available):

- the member booklet
- the scheme investment statement
- the scheme trust deed

Please briefly describe the documentation being forwarded and how it is being sent. (Depending on the structure of the scheme, we may require additional data from you).

Standard valuations cost NZ\$500 plus GST. An invoice will be forwarded with the report.
More complex valuations will be quoted for on an individual basis.

Please forward the completed form to us by email or post