

TROYAN, INC.

SPECIALISTS IN THE PREPARATION & REVIEW OF DOMESTIC RELATIONS ORDERS (ERISA), FEDERAL, STATE & MILITARY ORDERS

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Date _____

Name: _____

RE: _____ CASE NAME

Dear _____:

We have been requested to provide services in this matter which are billed on a time and charges basis. The estimated time which we anticipate will be required to provide the service(s) you have requested is as follows:

Review Domestic Relations Order and compare to underlying Agreement providing written commentary - 1 hour

The hourly billable rate for the above services will be as shown below:

Billable Rate - \$250.00

Based on the above services, the retainer to be paid with the return of the Engagement Letter is: **\$250.00**

Please initial where indicated, return original with check or credit card authorization, and retain a copy for your files. This signed Engagement Letter constitutes authorization to proceed with the services requested above.

Please be advised the above delineated retainer is to be paid prior to our services being rendered. Any required data is specified on the attached form. Return the required data with payment of our fee.

Yours truly,

Forwarded without my signature to avoid delay

Rosemary R. Weiss
QDRO Consultant

Fee Approved and Enclosed

Following are the items which are to be provided to us with the return of the signed Engagement letter and our fees:

- ___ 1. Provide a copy of the settlement agreement or a delineation of same.
- ___ 2. Date of marriage.
- ___ 3. Cutoff date to be used for acquisition of marital assets.
- ___ 4. Provide us with a copy of the current legal text of the Plan Document for the Plan being drafted against. ***At the very least we must have a copy of the Summary Plan Description.***
- ___ 5. If the Plan being drafted against is a Defined Benefit Plan provide an estimate from the Plan Sponsor which provides the employee's date of hire, date of participation, credited service and accrued benefit as of the applicable cut off date, which would be payable at normal retirement age.

If an underlying pension evaluation report was prepared in the matter provide that instead.
- ___ 6. If the Plan being drafted against is a Defined Contribution Plan obtain a copy of the statement provided to the employee as close as possible to the cut off date.
- ___ 7. Provide a copy of any information in your possession regarding the Domestic Relations Order guidelines established by the Company for this Plan.
- ___ 8. Provide a copy of the Domestic Relations Order we are to review.