

Pension Splitting for Divorce Ltd
4 Horton Drive
Middleton Cheney
Banbury
Oxfordshire
OX17 2LP

Dear Sirs

XXXXXXX County Court Case Number Pension Report

We represent Forename Surname in connection with divorce proceedings. His/Her Husband/Wife Forename Surname is represented by Solicitor 2

We are writing jointly to request that you prepare a pension report on how the parties' pensions are to be divided so as to produce equality of income in retirement. We require a formal valuation for divorce purposes and although it is unlikely, it may be necessary to require your attendance as an expert witness before the court on the issue of the report. Please advise us as to whether you have given evidence in court before.

We the undersigned jointly wish to instruct you to prepare a pension report as to how best the parties pensions could be divided, (split or earmarked) so that the income produced by the various schemes in retirement is equal to both of them. Obviously to avoid sex discrimination any such calculation should be calculated using a retirement age common to both parties. This formal report is required for divorce purposes and although it is unlikely, it may be necessary to require your attendance as an expert witness before the court on the issue of the report. Please advise us as to whether you have given evidence in court before.

We should be grateful if you would ensure that your valuation report complies with Part 35 of the Civil Procedure Rules and that:

- (1) The report is addressed to the Insert County Court and address and not to either of the instructing parties. However, one copy of the report should be sent to (Insert both solicitors' names).
- (2) The report contains details of your qualifications and of any literature or other material upon which you have relied in making your report.
- (3) The report contains a statement setting out the substance of all material instructions (written or oral) that have been given and should summarise the facts in the instructions

which are material to the opinions in your report. We anticipate that attaching a copy of this letter of instruction should suffice, unless it is necessary for you to make further enquiries.

- (4) Where there is a range of opinion on the matters dealt with in your report, the report should summarise the range of opinion and give reasons for your own opinion. If you are not able to give your opinion without qualification, you should state the qualification.
- (5) The report contains a summary of the conclusions reached by you.
- (6) The report must contain a statement that you understand your duty to the court and that you have complied with that duty.
- (7) The report must be verified by a Statement of Truth as follows:

‘I confirm that insofar as the facts stated in my report are within my own knowledge I have made clear which they are and I believe them to be true, and that the opinions I have expressed represent my true and complete professional opinion.’

- (8) Pension Splitting for Divorce Ltd has no conflict of interest in this joint instruction
- (9) The pension valuation is within their range of expertise
- (10) The pension report is provided within 28 days of the date of our letter.

We suggest that you contact Mrs/Mr Insert Surname direct on Telephone Number and Mrs Surname direct on Telephone Number to obtain further information

I enclose the relevant details from all the schemes concerned which were submitted with the form E particulars which give full details of all the schemes concerned, four defined benefit and 3 money purchase basis. The defined benefit scheme information as you can see contains Cash Equivalent Transfer Information.

Should you require further information please do contact me so that I can arrange this.

Solicitor Practice 1 and Solicitor Practice 2 accept that they should each be directly responsible to you for one half of the fee agreed payable for your opinion.

If you have any questions concerning these instructions, please telephone Insert Solicitors name of Practice and Solicitors name of Practice

Yours faithfully

Solicitor 1

Solicitor 2