**Note to solicitors:**

**The following template is designed to be copied and pasted onto the solicitor’s letterhead. Areas highlighted in yellow are to be edited or removed.**

**Dear Sirs,**

RE - Mr [*name*] and Mrs [*name*] Case reference – ABCD123

**The introduction**

We act for [Client 1 - *name and date of birth*] in divorce and financial remedy proceedings commenced/being heard at [*x*] family court [*case number*]. [*name and date of birth*] is represented by [*name and reference of solicitors*] of [*address, email and telephone number*].

[Client 2 - *name and date of birth*] is represented by [*name and reference of solicitors*] of [*address, email and telephone number*].

The parties were married/entered into a Civil Partnership on [*x*], both parties are in [*good*] health, neither party is a smoker/our client is a smoker/the other party is a smoker. [ specify any condition that may affect longevity]

On [*date of hearing*], the Court ordered that a pension report should be obtained, the parties have agreed that you should be appointed the Single Joint Expert regarding the following matters:

**The instruction [Example questions]**

1. *To share the pensions accrued to date to create an equality of income at the H & W’s respective ages of 60, 65, State retirement age. [Generally recommend no more than 3 ages].*
2. *Offsetting - If H/W wishes to retain £x of equity in the family matrimonial home/capital assets how should the pension share in ‘1’ be adjusted to reflect this?*
3. *Detail how the pensions should be shared to produce an income for H/W at [age] of £Z,000 per annum in today’s terms.*

**The paperwork**

We enclose the following:

1. A copy of the order dated [ ] [SJE appointment – if present].
2. Details of the pension arrangements for each party with CE and dates that they were obtained.
3. Extracts from each party’s Form E, relating to pensions.
4. Responses to the parties questionnaires in relation to pensions
5. Replies to Form P [If obtained although not necessary]
6. BR19 state pension forecast – Best obtained online - <https://www.gov.uk/check-state-pension>

**The rules**

We would be grateful if you would ensure that your report complies with Part 25 of the Family Procedure Rules 2010 and that:

1. The report is addressed to the **Family Court** at [*x*] .
2. Your duty is to help the court on matters within your expertise, this duty overrides any obligation to the parties instructing you or their solicitors. [r25.3]
3. The report should take into account those matters specified at paragraph 9.1 PD 25B.
4. The report must contain a statement of truth as follows:

“I confirm that I have made clear which facts and matters referred to in this report are within my own knowledge and which are not. Those that are within my own knowledge I confirm to be true. The opinions I have expressed represent my true and complete professional opinions on the matters to which they refer.”

**Timetable**

The next court appointment is listed on [*date*].

The court has directed that your report should be filed at court by [*date*]. If you have any difficulties meeting this deadline, please let both firms of solicitors know as soon as possible. [Unless the court doesn’t require the report to filed.]

Obviously, there is some room for slippage as the next hearing isn’t until [*x*] but we will need to know if the report can’t be filed on time so that we can make alternative arrangements.

Please note that the [rules – 25.10] or [order] states that each party can put written questions to you on one occasion within 10 days of receiving your report. These questions should only be for the purpose of clarification of the report and each party should send the other party a copy of those questions.

We ask that you serve the answers on the court and each party. We ask that you respond to the questions within 10 days of receiving them and arrange to prepare a separate invoice to the party who sent the questions for your time spent answering them.

**Fees**

Please contact each firm to agree your fee in advance *or* we confirm that we have agreed a fee of [*£.*  ] [Mr and Mrs [name] will each be directly responsible to you for [one-half of your fee.] or [Please send each firm an invoice for 50% of your fee.]

Yours faithfully,

Solicitors for [*name*] Solicitors for [*name*]