QDRO REQUEST FORM

## $\square \quad$ I would like pre-approval (if allowed by the Plan). Note: A review of the draft QDRO typically takes 30-60 days.

## PART A: CASE INFORMATION

## PLAINTIFF / PARTY A:

Name:

Street Address: $\qquad$
City, State Zip: $\qquad$
Phone Number: $\qquad$
Email Address: $\qquad$
Social Security Number: $\qquad$
Date of Birth: $\qquad$
The Social Security Number is necessary for the Participant

Plaintiff / Party A is the: $\square$ PLAN PARTICIPANT $\square$ ALTERNATE PAYEE
Are either parties intending to move to a different address within the next 60 days? $\square$ res $\square$ No
If yes, which party? $\square$ Plaintiff / Party A $\square$ Defendant / Party B

Name of the person completing this form: $\qquad$

QDROCO generally requires that at least one party be represented by an attorney. Provide the name(s) of the applicable attorney(s) below.

Plaintiff $\square$ does $\square$ does not have an attorney

## PLAINTIFF/PARTY A ATORNEY:

Attorney Name: $\qquad$
Firm Name:
Street Address: $\qquad$
City, State Zip: $\qquad$
Phone Number: $\qquad$
Email Address: $\qquad$

COURT INFORMATION:
Case No.: $\qquad$
Judge: $\qquad$
County: $\qquad$

Defendant $\square$ does $\square$ does not have an attorney DEFENDANT/PARTY B ATTORNEY:

Attorney Name: $\qquad$
Firm Name: $\qquad$
Street Address: $\qquad$
City, State Zip: $\qquad$
Phone Number: $\qquad$
Email Address: $\qquad$

## DURATION OF MARRIAGE:

Date of Marriage: $\qquad$
Date of Divorce: $\qquad$
Date of Division:

## PART B: PAYMENT INFORMATION

(Q)DRO Drafting: \$500

Order Dividing Military Retirement Pay: Call for Quote
Equalization Calculation: \$100

How are the fees to be paid? Other
Who is your preferred consultant? Sharee Burkel

## DOCUMENTS REQUIRED:

- Divorce Decree
- Account/benefit statement for each plan being divided (dated within the last 90 days)

Please forward these to: intake@qdroco.com

## PART C: PLAN INFORMATION

## QDRO \#1 - INFORMATION FOR RETREMENT PLAN BEING DIIIDED

Employee (Participant) Name: $\qquad$ Gender: $\qquad$
Employer/Company Name:
Company Phone: $\qquad$ Contact Person: $\qquad$
Plan Name: $\qquad$
Hire Date: $\qquad$
Employment Status:
$\square$ Hourly
$\square$ Employed
$\square$ Salaried
$\square$ Terminated $\square$ Retired
(Date of Retirement)

## Assignment Instructions - Defined Contribution Plan

(e.g., 401(k), 403(b), Profit Sharing, Thrift Plans, Deferred Comp)

Complete this section if the details are not included in the Judgment. If both are silent we will use our defaults.

- Assignment:__ \% of Total Account Balance as of $\qquad$ /__ $\qquad$ ;

回\$ $\qquad$ as of $\qquad$
$\qquad$
$\qquad$ -i
GOther: $\qquad$

- Include gains/losses (choose one): $\square \mathrm{Yes}$ (default) $\square$ No
- Loan Treatment (choose one): $\square$ Include in total account balance $\square$ Exclude from total account balance (default)


## Assignment Instructions - Defined Benefit Plan (e.g., Private Pension Plan)

Complete this section if the details are not included in the Judgment. If both are silent, we will use our defaults.

- Amount: $\qquad$ \% marital portion coverture
$\qquad$ \% frozen as of the divorce date
$\qquad$ \% total benefit at retirement
$\qquad$ \$ per month
Other: $\qquad$
- Whose life expectancy? * $\square$ Alternate Payee (separate interest) (default) $\square$ Participant (shared Interest)
- Include a qualified pre-retirement survivor annuity (QPSA)? $\square$ Yes (default) $\square$ No
- Include a qualified post-retirement joint and survivor annuity (QJSA) (only for shared payment)? $\square$ Yes
- Include early retirement subsidies and supplements? $\square$ Yes $\square$ No
- Include cost-of-living adjustments? $\square \mathrm{Yes} \square \mathrm{No}$
*If the Participant is in payout status, a shared payment approach is the only option and the form of benefit elected at the Participant's retirement cannot be altered.


## PART C: PLAN INFORMATION

## QDRO \#2 - INFORMATION FOR RETIREMENT PLAN BEING DIVIDED

Employee (Participant) Name: $\qquad$ Gender: $\qquad$
Employer/Company Name:
Company Phone: $\qquad$ Contact Person: $\qquad$
Plan Name: $\qquad$
Hire Date: $\qquad$
Employment Status:
$\square$ Hourly $\square$ Employed
$\square$ Salaried
$\square$ Terminated $\square$ Retired
(Date of Retirement)

## Assignment Instructions - Defined Contribution Plan

(e.g., 401(k), 403(b), Profit Sharing, Thrit Plans, Deferred Comp)

Complete this section if the details are not included in the Judgment. If both are silent, we will use our defaults.

- Assignment: $\square$ \% of Total Account Balance as of $\qquad$ /__/ $\qquad$ ;
$\qquad$
$\square$ other:
- Include gains/losses (choose one): $\square$ res (defaulf) $\square$ No
- Loan Treatment (choose one): $\square$ Include in total account balance $\square$ Exclude from total account balance (default)


## Assignment Instructions - Defined Benefit Plan (e.g., Private Pension Plan)

Complete this section if the details are not included in the Judgment. If both are silent, we will use our defaults.

- Amount: $\qquad$ \% marital portion coverture
$\qquad$ \% frozen as of the divorce date
$\qquad$ \% total benefit at retirement
$\qquad$ \$ per month
Other: $\qquad$
- Whose life expectancy? * $\square$ Alternate Payee (separate inteest) /default) $\square$ Participant (shared Interest)
- Include a qualified pre-retirement survivor annuity (QPSA)? $\square$ Yes (default) $\square$ No
- Include a qualified post-retirement joint and survivor annuity (QJSA) (only for shared payment)? $\square$ Yes
- Include early retirement subsidies and supplements? $\square \mathrm{Yes} \square \mathrm{No}$
- Include cost-of-living adjustments? $\square$ Yes $\square$ No
*If the Participant is in payout status, a shared payment approach is the only option and the form of benefit elected at the Participant's retirement cannot be altered.

Additional Comments and Further Directives:
Use the space below for any information we should know that was not previously indicated.

> THE RETENTION AGREEMENT \& PAYMENT INFORMATION WILL BE EMAILED TO THE PARTIES If the parties do not use email, we will forward this information to you to share with your client.

