(877) 661-7376
info@qdroco.com

Please STOP and Read this information!

(1) Download this to your computer OR open it with Adobe to fill and save. Otherwise the information *will not* save. You can then submit this Form electronically by submitting through the Submit button in Adobe, save and send by email, or print and send by regular mail.

OR, complete the *new* Online Intake Form (for Michigan Only) by clicking HERE.

QDRO INTAKE FORM

(For State & Municipal Plans, FERS/CERS or Military Plans - Contact Us)

This document is meant to be a guide. As always, we welcome phone calls. We are glad to discuss the specifics of your case and what information we would need from you to get started.

Contents of this Packet:

- Checklist detailing what we need and how to submit it
- Payment Options
- Request Form
- Instructions for Division
- Engagement Agreement

Retention Overview:
To retain our services, you must provide the information detailed in the checklist. We will draft the Order in accordance with the terms of the Separation Agreement or Judgment Entry. If any division details are not provided in these documents, we will require that you provide instruction prior to preparing our draft. If both the decree and the request form are silent regarding assignment directives, we will use our default approaches.

Pre-Approval:
Our drafting service includes pre-approval at no additional charge. It typically takes 30-60 days for a Plan Administrator to review a draft QDRO. If you would like to opt out of this service, please check the appropriate box on the request form. You will be given a copy of the QDRO when we send it to the Plan Administrator, and you can have it court-certified at any time, especially if time is a factor. Also, please note that not all Plan Administrators will review a draft QDRO; some will only accept a court-certified copy. We will advise when a preliminary review is not an option.

QDROCO does not provide individual legal, financial or tax advice or services.
Use of our QDRO drafting service does not create a client-lawyer relationship.

1

To retain our QDRO Drafting Services, you must provide the following information:

NEW: Documents can be electronically attached to this form. See last page.

☐ Worksheet: The QDRO Request Form can be found on the next page of this packet.

☐ Instructions: If you are requesting our office prepare an Order, please provide a copy of the Separation Agreement or Judgement of Divorce, or in the event that these do not yet exist, instructions on how to divide the benefit in a cover letter or on the request form.

☐ Plan Information: We require a current Account Statement (for Defined Contribution Plans) or Accrued Benefit Statement (for Defined Benefit Plans).

☐ Prepayment: We require full payment of our fee before we provide the draft QDRO. A minimum of 50% of our fee is required to be considered retained. You may send a check by mail or pay online within an invoice we must create for you. (Payment directly through our website is coming soon.)

2

Once you have gathered the above, submit the packet and supporting documents to:

Email: Open using Adobe, complete, save and submit electronically or send by email to documents@qdroco.com.
Fax: (866) 792-3674
Mail: P.O. Box 422, Chelsea, MI 48118

3

After reviewing your submission, we will advise you if we require any further documentation. In the event you have any of the following items, please provide them with your initial submission. This may expedite the process.

- Any additional participant-specific plan information (i.e., balances for use in offset, etc.)
- Model QDRO Language
- Written QDRO Procedures
- Summary Plan Description

Once the QDRO is completed, it will be uploaded to our secure Client Portal and shared with you.
Once retained, you will receive an invitation to set up your login credentials to the Client Portal.
If you need documents shared with you in another way, please let us know.

QDRO INTAKE FORM

A standard Order includes: (1) plan document review; (2) retirement plan verification; (3) a draft Order; and (4) pre-approval if the Plan will review a draft.

☐ I opt out of free pre-approval (if allowed by the Plan).

Note: A review of the draft QDRO typically takes 30-60 days.

Completed orders will be sent only to a Party's attorney (or to a Party if unrepresented) who has paid at least part of QDROCO's fees. Orders *will not* be sent to a non-paying Party or his or her attorney unless instructed to do so by the paying party or his or her attorney. Exception: the orders will be sent to both parties if the judgment requires one party to pay our entire fee.

PART A: CASE INFORMATION

PLAINTIFF / PARTY A:

Name: ______________________________

Street Address: ______________________________

City, State Zip: ______________________________

Phone Number: ______________________________

Email Address: ______________________________

Social Security Number: ________________________

Date of Birth: ______________________________

DEFENDANT / PARTY B:

Name: ______________________________

Street Address: ______________________________

City, State Zip: ______________________________

Phone Number: ______________________________

Email Address: ______________________________

Social Security Number: ________________________

Date of Birth: ______________________________

Plaintiff / Party A is the: ☐ PLAN PARTICIPANT ☐ ALTERNATE PAYEE

Are either parties intending to move to a different address within the next 60 days? ☐Yes ☐ No

If yes, which party? ☐ Plaintiff / Party A ☐ Defendant / Party B

Name of the person completing this form: ____

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

Plaintiff ☐ does ☐ does not have an attorney

PLAINTIFF/PARTY A ATTORNEY:

Attorney Name: ______________________

Firm Name: ______________________

Street Address: ______________________

City, State Zip: ______________________

Phone Number: ______________________

Email Address: ______________________

Defendant ☐ does ☐ does not have an attorney

DEFENDANT/PARTY B ATTORNEY:

Attorney Name: ______________________

Firm Name: ______________________

Street Address: ______________________

City, State Zip: ______________________

Phone Number: ______________________

Email Address: ______________________

COURT INFORMATION:

Case No.: ______________________

Judge: ______________________

County: ______________________

DURATION OF MARRIAGE:

Date of Marriage: ______________________

Date of Divorce: ______________________

Date of Division: ______________________

PART B: PAYMENT INFORMATION

QDRO / EDRO Drafting..$500
IRA DRO Preparation..$500
Federal Pension (FERS or CSRS)..$500
Order Dividing Military Retirement Pay..Call for Quote

Equalization Calculation..$200

Fee Schedule effective November 1, 2020

THREE WAYS TO PAY:

1 **Online:** Pay with LawPay

2 **By Check:** Make check payable to "The QDRO Company, LLC" and mail to P.O. Box 422, Chelsea, MI 48118.

3 **Through our secure Client Portal:** One or both parties will receive an invoice as instructed below:

☐ Split the fees equally between the parties
☐ The Retirement Plan Participant is to pay 100% of the fee
☐ The Alternate Payee is to pay 100% of the fee

Please identify the QDRO Consultant to be assigned to this matter:

☐ Sharee Burkel ☐ Carrie Cole ☐ U. Ashwin Patel

PART C: PLAN INFORMATION

QDRO #1 – INFORMATION FOR RETIREMENT PLAN BEING DIVIDED

Employee (Participant) Name: ______________________________________ Gender: ___________

Employer/Company Name: ____

Company Phone: ______________________________ Contact Person: ________________________

Plan Name: ____

Hire Date: ________________

Employment Status: ☐ Hourly ☐ Salaried

☐ Employed ☐ Terminated ☐ 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 ____ /____ /_____;

  ☐$__________ as of ___ /___ /_____;

  ☐Other: ____

- Include gains/losses (choose one): ☐Yes *(default)* ☐No
- Loan Treatment (choose one): ☐Include in total account balance ☐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: ______% marital portion coverture

  ______% frozen as of the divorce date

  ______% total benefit at retirement

  ______ $ per month

  Other: ____

- Whose life expectancy? * ☐ Alternate Payee (separate interest) *(default)* ☐ Participant (shared Interest)
- Include a qualified pre-retirement survivor annuity (QPSA)? ☐ Yes *(default)* ☐ No
- Include a qualified post-retirement joint and survivor annuity (QJSA) (<u>only for shared payment</u>)? ☐ Yes
- Include early retirement subsidies and supplements? ☐ Yes ☐ No
- Include cost-of-living adjustments? ☐ Yes ☐ 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: ______________________________________ Gender: ___________

Employer/Company Name: ____

Company Phone: ______________________________ Contact Person: ________________________

Plan Name: ____

Hire Date: ________________

Employment Status: ☐ Hourly ☐ Salaried
☐ Employed ☐ Terminated ☐ 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 ___ /____ /______;
  ☐$__________ as of ___ /___ /_____;
  ☐Other: ____
- Include gains/losses (choose one): ☐Yes ***(default)*** ☐No
- Loan Treatment (choose one): ☐Include in total account balance ☐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: ______% marital portion coverture
  ______% frozen as of the divorce date
  ______% total benefit at retirement
  ______ $ per month
  Other: ____
- Whose life expectancy? * ☐ Alternate Payee (separate interest) ***(default)*** ☐ Participant (shared Interest)
- Include a qualified pre-retirement survivor annuity (QPSA)? ☐ Yes ***(default)*** ☐ No
- Include a qualified post-retirement joint and survivor annuity (QJSA) (*only for shared payment*)? ☐ Yes
- Include early retirement subsidies and supplements? ☐ Yes ☐ No
- Include cost-of-living adjustments? ☐ Yes ☐ 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.*

IF YOU NEED ADDITIONAL QDROs, PLEASE SUBMIT AN EXTRA SHEET.

Additional Comments and Further Directives:

Use the space below for any information we should know that was not previously indicated.

We require the following:

- Judgment of Divorce
- Settlement Agreement (if applicable)
- Plan Statement(s)

Attach Documents Here

After submission of this Intake Form, our Retention Agreement will be forwarded for signature to the applicable party/ies paying for our services.