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QDRO FACT SHEET

This Fact Sheet is designed to be completed by an attorney or staff that understands the terminology of QDROs and Family Law, and the importance of accurate information. If this Fact Sheet is being completed by a client, the client should consult with his or her attorney prior to submitting the form to my office.

1. Plan Participant (Employee)

- a. Full Legal Name: _____
- b. SS# (Must have complete #): _____
- c. DOB: _____
- d. Last known address: _____
- e. Attorney for Participant: _____
Legal Assistant's Email: _____
- f. Date of beginning of Plan participation: _____
- g. Date of termination of Plan participation (if any): _____
- h. Employee ID No. (if any): _____
- i. Is the participant currently receiving retirement benefits from this Plan: _____
- j. Employment status of participant (active, laid-off, terminated or retired): _____
- k. Was the employee hourly or salaried or both: _____

2. Alternate Payee (Non-employee spouse)

- a. Full Legal Name: _____
- b. SS# (Must have complete #): _____
- c. DOB: _____
- d. Current address: _____
- e. Attorney for Alternate Payee: _____
Legal Assistant's email: _____

3. Facts

- a. Date of Marriage: _____ Date of Divorce: _____
- b. Date of Division if different from Date of Divorce (must be contained in Decree):

How is the plan to be divided pursuant to the Decree (\$ amount or %):
To Participant: _____
To Alternate Payee: _____
- c. Has the Court previously signed a QDRO in this case on this Plan: _____

4. The Plan

- a. Plan Sponsor (Employer): _____
- b. **Exact** name of the Plan: _____
- c. Name of Plan Administrator or HR contact: _____
- d. Address of Plan Administrator: _____
- e. Telephone number of Plan Administrator or HR contact: _____

5. Questions for Military Service Members only:

- a. Rank/rate & pay grade currently or at date of retirement: _____
- b. Any promotions within 36 months of date of divorce or retirement?: _____
- c. Active Duty or Reserves: _____ Current status (active or retired): _____

If any reserve service, we need a copy of the reserve points history.

- d. Will former spouse be designated as the Survivor Benefit Plan beneficiary? _____

I MUST HAVE THE FOLLOWING FOR EVERY QDRO:

- 1. FEE OF \$400.00 PER QDRO. Payment can be made by Zelle, check or with a card over the phone.
- 2. NAMES, ADDRESSES, PHONE NUMBERS & BAR NUMBERS OF THE ATTORNEYS INVOLVED IN CASE THAT WILL BE APPROVING THE QDRO (ATTORNEY SIGNATURE PAGE OF DECREE IS SUFFICIENT);
- 3. COPY OF FIRST PAGE OF DECREE AND PAGE(S) THAT DIVIDE(S) THE RETIREMENT PLAN(S) (SOME PLANS REQUIRE RECENTLY CERTIFIED COPIES OF DECREE. WE WILL ADVISE IF APPLICABLE). IF AMENDING A QDRO, A COPY OF THE PRIOR QDRO AND ANY PLAN REJECTION LETTER;
- 4. IF AVAILABLE, COPY OF RECENT PLAN STATEMENT & SAMPLE QDRO FORMS.

If the Decree is silent as to certain options, such as the benefit form, COLAs, or earnings on defined contribution plans, we will include the most common provisions as defaults. If you desire different options, you must advise us. Many Plans now charge a fee to process a QDRO. Any fees charged by the Plan, or Court filing fees, are not included in the fees paid to us and must be paid by one or both parties.

IF QDRO PAPERWORK IS SENT TO US WITHOUT PAYMENT OF MY FEE, IT WILL BE KEPT FOR 60 DAYS, THEN SHREDDED. NO WORK IS DONE ON A FILE UNTIL FEE IS RECEIVED, EXCEPT FOR NOTIFICATION OF ADDITIONAL ITEMS OR INFO NEEDED.

OUR FEE INCLUDES ANY NEEDED AMENDMENTS TO GET PLAN APPROVAL. IN MOST CASES, WE WILL REQUIRE ADDITIONAL INFORMATION OR DIRECTION. IF REVISIONS NEED TO BE MADE, PLEASE CONTACT US AND WE WILL MAKE THE CHANGES AT NO ADDITIONAL FEE.

QDRO PREPARATION IS SUBJECT TO THOSE TERMS AND CONDITIONS CONTAINED IN THE "QDRO PREPARATION" DOCUMENT AVAILABLE ON OUR WEB SITE. THE COMPLETION AND RETURN OF THIS QDRO FACT SHEET INDICATES YOUR ACCEPTANCE OF THOSE TERMS AND CONDITIONS. IT IS ESSENTIAL THAT THE ATTORNEYS AND THE PARTIES CAREFULLY REVIEW THE QDRO TO ENSURE IT COMPLIES WITH THE INTENT OF THE PARTIES AND/OR THE COURT AND CONTAINS NO TYPOS.

Revised Oct. 2022