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QDRO FACT SHEET
Pro Se Party – Defined Benefit Plan

QDRO preparation services are offered by the above-named corporation and not a licensed attorney. No legal advice or services will be provided. If you need legal advice, please consult with an attorney.

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 / military service: _____
- g. Date of termination of Plan participation / military service (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: _____

Unless each issue below is specifically addressed in the Decree, please provide a response. Unless the Participant is currently receiving retirement benefit payments, the QDRO will be prepared using a "separate interest method", unless we are instructed otherwise. If you don't understand the difference between a "separate interest" and "shared interest" for defined benefit plans, you should obtain the advice of any attorney, financial advisor or check the "Definitions" on our web site.

- d. Does the award include cost of living allowances, if available? _____
- e. Does the award include early retirement supplements or subsidies, if available? _____
- f. Does the award include a portion of any pre-retirement surviving spouse benefit, if available?

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, I need a copy of the reserve points history.
- d. Will former spouse be designated as the Survivor Benefit Plan beneficiary? _____

WE MUST HAVE THE FOLLOWING FOR EVERY QDRO:

- 1. FEE OF \$400.00 PER QDRO;
- 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.

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 PAPER WORK IS SENT TO US WITHOUT PAYMENT OF THE 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 PARTIES CAREFULLY REVIEW THE QDRO TO ENSURE IT COMPLIES WITH THE INTENT OF THE PARTIES AND/OR THE COURT AND CONTAINS NO TYPOS.

Revised June 2021