To begin the QDRO Process -
Attorneys, please return this form to:

QDRO RESOURCES, INC.
1501 Hall Johnson Rd. #157
Colleyville, Texas 76034
Office 817-984-7585 Fax 817-984-7589
Email: Lynsie@QDROresources.com

QDRO FACT SHEET

IMPORTANT: QDRO Resources, Inc. does not obtain the signatures of opposing attorneys or parties, nor do we submit to the Court or obtain the Judge's signature. That is the responsibility of the parties or their attorneys. Our only function is the preparation of the QDRO (or other division order) and submission of a certified copy of such to the Plan Administrator. We do not provide legal, tax or investment advice.

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 our office.

1. **Plan Participant (Employee)**
   - a. Full Legal Name: _____
   - b. SS# (Must have complete #): _____
   - c. DOB: _____ Phone: _____
   - 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 benefit payments 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: _____ Phone: _____
   - 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 Alternate Payee: _____
   - c. Has the Court previously signed a QDRO in this case on this Plan: _____
     (If an Amended QDRO is needed, we will need a copy of the prior QDRO and a copy of any rejection letter or plan communication.)

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. Active Duty or Reserves: _____ Current status (active or retired):_____

   If any reserve service, we need a copy of the Reserve Points Statement.

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

6. **Unless each issue below is addressed in the Decree, please provide a response.**

   For Defined Benefit Plans (Pensions with monthly annuity payments). Unless the Participant is currently receiving retirement benefit payments, the QDRO will be prepared as a "separate interest", if available, unless we are directly otherwise.:

   a. Are cost of living allowances (COLAs) included, if available?: _____

   b. Are early retirement subsidies or supplements included, if available?: _____

   c. Is a pre-retirement surviving spouse benefit included, if available?: _____

   For Defined Contribution Plans (401k, 457b, 403b):

   a. Are gains and losses from the division date included?: _____

   b. Are any loan balances to be first deducted from the account balance prior to calculating the awarded amount?: _____

   c. If the Plan charges a processing fee, who will pay it?: Participant: ____% Alternate Payee: ____%

WE MUST HAVE THE FOLLOWING FOR EVERY QDRO:

1. FEE OF $450.00 PER QDRO. **MRPDO (Military) and FERS Orders are $900 each.** Payment can be made by Payment Link (provided upon review of intake), firm check or with a card over the phone.
2. COMPLETED FACT SHEET PROVIDED BY AN ATTORNEY'S OFFICE.
3. COPY OF DECREE (DRAFT IS ACCEPTABLE) AND/OR MEDIATED SETTLEMENT AGREEMENT (SOME PLANS REQUIRE RECENTLY CERTIFIED COPIES OF DECREE. WE WILL ADVISE IF APPLICABLE).
4. IF AVAILABLE, COPY OF RECENT PLAN STATEMENT & SAMPLE QDRO FORMS.

Many Defined Contributions 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 THE FEE, IT WILL BE RETAINED FOR 60 DAYS. NO WORK WILL BE PERFORMED ON A FILE UNTIL THE FEE IS RECEIVED, EXCEPT FOR NOTIFICATION OF ADDITIONAL ITEMS OR INFO NEEDED.

OUR FEE INCLUDES ANY NEEDED AMENDMENTS TO GET PLAN APPROVAL, BUT ARE ONLY PROVIDED DIRECTLY TO AN ATTORNEY. IN MOST CASES, WE WILL REQUIRE ADDITIONAL INFORMATION OR DIRECTION. ATTORNEYS MAY CONTACT US REGARDING ANY REVISIONS NEEDED.

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.