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QDRO PROFESSIONALS, LLC MILITARY QUESTIONNAIRE

1. Documents to be provided:

A. Active Duty

- a. Current Leave and Earnings Statement (LES) - generated twice a month to show pay, allowances, deductions, accrued leave, etc. (equivalent to a pay stub)

B. Guard/Reserve

- a. Retirement Points Statement (chronological statement of retirement points, such as ARPC Form 249 for Army Reserve or NGB Form 23 for National Guard) - issued at least once a year to each Guard/Reserve member

C. Retirees

- a. Retiree Account Statement (DFAS-CL Form 7220) - generated a minimum of once per year (usually around December) to show gross retired pay, changes in the rate of pay, VA waiver, Survivor Benefit Plan premiums, etc.
- b. Certificate of Release or Discharge (DD Form 214) or other separation papers;
- c. Retirement orders (issued at retirement);

D. Survivor Benefit Plan (SBP) Election Form

- a. For a Reserve/Guard member, this would have been first completed at the 20-year mark (Form 2656, Data for Retired Personnel **and** Form 2656-5, RCSBP Election Certificate).
- b. For an Active Duty servicemember, the election form would be completed as part of the retirement process (Form 2656, Data for Retired Personnel).
- c. If the parties are already divorced, there may be a Form 2656-1 (SBP Election Statement for Former Spouse Coverage).

E. General documents – court order, separation agreement or any other underlying settlement document that provides for pension division, and the divorce decree (if applicable)

The LES, Retiree Account Statement (RAS) and Retirement Points Statement can be found on the secure DFAS website, <https://mypay.dfas.mil/mypay.aspx>. Prior

SBP election forms can be requested from the local Retirement Service Office or local Guard/Reserve branch.

2. Basic Information

- a. Date of Marriage: _____
- b. Date of Separation: _____
- c. Date of Divorce: _____

3. Identifying information for *servicemember or retiree*: (refer to LES, RAS, or retirement order for most of this)

- a. Full name: _____
- b. Date of Birth: _____ Social Security Number: _____
- c. Current Mailing address: _____

- d. Email Address: _____
- e. Phone Number: _____
- f. Attorney for SM: _____ Email: _____
- g. Rank/Pay grade: _____ at separation _____ currently (or at retirement)
- h. Branch of service: _____
- i. Date of entry into the service (Base Pay Entry Date): _____
- j. If applicable, date of retirement from service (for Reserve/Guard personnel, this is the date one stops serving, not the date--age 60--that pension payments start):

4. Identifying information for *former spouse (non-servicemember)*:

- a. Full name: _____
- b. Date of Birth: _____ Social Security Number: _____
- c. Current Mailing address: _____

- d. Email Address: _____
- e. Phone Number: _____

f. Attorney for FS: _____ Email: _____

5. **Computational Information** – Please complete the following, which serves as the basis for the pension division order:

A. FOR ACTIVE DUTY CASES:

Background information: ONE of the following must be used -- check () one option on the line provided. If the distribution to spouse is set out in an order or agreement, **a copy of the order/agreement must be attached.**

i. _____ Set dollar amount (i.e., \$400 a month to Mrs. Brown)

ii. _____ Percentage (i.e., 44% of Mr. Brown's disposable retired pay)

iii. _____ Formula (i.e., half of the marital fraction of Mr. Brown's disposable retired pay, defined as 140 months of marital pension service divided by X months of total pension service, this number to be computed by DFAS when he retires). If member is still serving, then formula clause is usually used.

iv. _____ Hypothetical (i.e., 39% of the disposable retired pay of a Major with 24 years of creditable service). If member entered service after 9/7/1980, you must provide the following information:

- hypothetical retired pay base: _____
- hypothetical years of creditable service: _____
- hypothetical date of retirement: _____

(NOTE: The set dollar amount does not contain a COLA, or cost-of-living adjustment.)

B. FOR RESERVE OR GUARD CASES:

Background information: You must check () one of the following divisions.

i. _____ Set dollar amount (i.e., \$400 a month to Mrs. Brown)

ii. _____ Percentage: Give the percent that you want to use (not greater than half). Use this when the member is no longer performing Reserve/Guard service and has put in for retirement (or is retired).

iii. _____ Points: Use this when the member is still serving. Give the total points acquired during the marriage before date of separation, divorce, or other applicable date under state law. DFAS will calculate the total points of creditable service. Spouse gets half of this marital share (unless you specify otherwise). If member is in Guard/Reserve, use of retirement points is required in formula clause with X as denominator. For Reserve or National Guard spouses, you should get and review a copy of the servicemember's points statement. Number of marital points: _____ points. **(COMPLETE points statement must be attached if this option is chosen)**

Marital Points means between Date of marriage and date of separation, date of divorce, or other date specified by state law or Final Order/Agreement.

- iv. _____ Time: You may **not** use this if member is still serving and you are using a “formula clause.” DFAS regulations require use of a points calculation for Reserve/Guard cases when a formula clause is used. If parties agree on all numbers (months of marital pension service, total pension service) or if member is retired, then “months over months” can be converted into a fraction, then that can be multiplied times 50% to arrive at a PERCENTAGE. Percentage for spouse/former spouse: _____%

IF RETIRED WHEN HUSBAND AND WIFE SEPARATE, ATTACH THE MOST RECENT RETIREE ACCOUNT STATEMENT, FORM DFAS-CL 7220.

6. Survivor Benefit Plan election: If a survivor annuity is to be provided to the former spouse, please fill out the following information:

- a. Type of coverage:
- i. _____ Former spouse only coverage
 - ii. _____ Former spouse and child(ren) coverage
 - iii. _____ Child(ren) only coverage
 - iv. _____ Other coverage - specify type\beneficiary
- b. Base amount (the SBP benefit paid to the beneficiary is 55% of the base amount):
- i. _____ Full retired pay
 - ii. _____ Lesser amount (can be any amount \$300 per month or greater)

Remember that, without SBP coverage, the pension stops when the retiree dies.

- c. **IF RESERVE OR GUARD:** Reserve Component SBP (Survivor Benefit Plan) applies if one is in the Reserves or National Guard. Check () one of the following:
- i. _____ SM (Servicemember) has already retired. The election was: (see next two items for available options)_____.
 - ii. _____ SM hasn't retired yet, has attained 20 years of creditable service, has chosen to have coverage start at 60th birthday (i.e., death of SM occurs before then, payments begin at what would have been age 60 for the SM).
 - iii. _____ SM hasn't retired yet, has attained 20 years of creditable service, has chosen to have coverage and payments start at death, even if before age 60.
 - iv. _____ SM has not attained 20 years of service yet, client would like decision to be (fill in blank):

- d. SM and spouse have decided to use life insurance instead of SBP, terms are as follows:

_____.

NOTE: Without SBP, pension share payments end at death of the SM.

5. **Pension Offsets:** Does the retiree also receive (or is eligible to receive) any of the following:
- a. Military disability retired pay? _____
 - b. Department of Veterans Affairs disability compensation? _____
 - c. If **YES** regarding either, please provide details (including disability rating, monthly amount of pay/compensation, CRDP, or CRSC) here:

- d. Does the SM participate in the Thrift Savings Plan (TSP)? _____ *The TSP is a contributory retirement plan, similar to a 401k plan or a profit-sharing plan.*

(1) If the member participates, **provide a copy of the most recent quarterly account statement.**

(2) If the TSP is to be divided:

i. State how -- fixed dollar amount, percentage, or formula?
\$ _____; _____ %
Formula: _____

ii. Specify effective date of division (e.g., date of separation, date of divorce).

iii. Are interest and earnings to be included after this date?
Yes _____ No _____

iv. Will the non-employee spouse's share of the TSP be paid directly to the former spouse or rolled over into an eligible plan or IRA?

Paid directly _____

Rolled _____

If rolled over, give the financial institution's name and address, as well as the account number of the plan or IRA. Also, provide a contact name and phone number and instructions for receiving the incoming transfer.

