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QDRO PROFESSIONALS, LLC MILITARY QUESTIONNAIRE

1. Documents to be provided:

A. Active Duty Service Members:

- a. Current Leave and Earnings Statement (LES)* - generated twice a month to show pay, allowances, deductions, accrued leave, etc. (equivalent to a pay stub); go to pay center secure web portal to obtain a copy

B. Guard/Reserve Service Members:

- a. Current 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; go to pay center secure web portal to obtain a copy
- b. Retirement Points Statement as of Date of Divorce

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 premium and beneficiary, etc.
- b. Certificate of Release or Discharge (DD Form 214) or other separation papers;
- c. Retirement orders (issued at retirement);
- d. Combat-Related Special Compensation (CRSC) statement (if applicable)
- e. Letter from DFAS at or before retired pay_starts (showing amount and how calculated)
- f. In VA disability cases, the findings and ratings letter(s)

D. Survivor Benefit Plan (SBP) Election Form**

- a. For a Reserve/Guard member, this would have been completed at the 20-year mark (for DFAS- 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

*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 Filing: _____
- d. Date of Final Order Approving Agreement: _____
- e. Date of Divorce (if different from (d)): _____
- f. State of Divorce: _____
- g. How was jurisdiction determined by the Court?
 - Parties consented to jurisdiction
 - Other: _____

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 #: _____
- c. Current Mailing address: _____

- d. Email Address: _____
- e. Phone Number: _____
- f. Attorney for SM: _____
- g. Attorney Email: _____
- h. Branch of Service: _____ (Air Force, Army, Navy, etc.)
- i. Component (Active Duty, National Guard, Reserves): _____

- j. "DIEMS" (Base Pay Entry Date): _____
- k. If any breaks in service, please specify: _____
- l. Date SM retired: (Reserve/Guard this is the date you stop serving, not the date (age 60) that pension payments start): _____
- m. Date SM is first eligible to retire: _____
- n. Disability/VA Waiver:
 - i. Has Service member been rated with a disability by the Veteran's Administration (VA)? (check one): YES NO
 - ii. Was Service member rated for a VA disability prior to divorce? YES NO
 - iii. If so, what percentage was disability rating as of Date of Divorce?

 - iv. Has Service member been reevaluated by the VA since the divorce? YES NO
 - v. If so, what percentage is disability rating now? _____
- o. Is Service Member remarried?: _____
 - i. Date of Remarriage: _____
 - ii. Current Spouse full name: _____
 - iii. Is current Spouse listed as Survivor Beneficiary for retired pay? YES NO
 - iv. If yes, what date was that election made with DFAS? _____

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

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

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

- e. Attorney for FS: _____
- f. Attorney Email: _____
- g. Is Former Spouse remarried: _____ Date of Remarriage: _____
- h. Current Spouse full name: _____

5. **Blended Retirement System (BRS) Information** - SMs (servicemembers) who were eligible may have opted into the BRS during calendar year 2018. This can have significant impacts on retired pay and SBP amounts, and no consent of the spouse is required. Did SM opt in? Please provide information on lines below:

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

- a. Was the Divorce Order filed on or before December 23, 2016?
 _____ YES **(SKIP TO SECTION 7)**
 _____ NO (CONTINUE TO QUESTION 6(b))
- b. If Divorce Order was filed after December 23, 2016, was SM already receiving retired pay on date Divorce Order was filed?
 _____ YES **(SKIP TO SECTION 7)**
 _____ NO (CONTINUE TO QUESTION 6(c))
- c. Rank/Pay grade of Service Member:
 _____ at separation,
 _____ at date of filing (date action was filed with Court)
 _____ at divorce
 _____ currently on _____ (Date)
 _____ at retirement
- d. For Active Duty and Reserve/Guard fill in Creditable time of service as of:
 Date of Marriage: _____ years and _____ months
 Date of Separation: _____ years and _____ months
 Date of Filing: _____ years and _____ months
 Date of Divorce: _____ years and _____ months
 Date of Retirement: _____ years and _____ months
- e. For Reserve/Guard fill in total retirement points as of:
 Date of Marriage: _____ points
 Date of Separation: _____ points
 Date of Filing: _____ points
 Date of Divorce: _____ points
 Date of Retirement: _____ points

7. How is the Benefit to Former Spouse Calculated?

- Set dollar amount (i.e., \$400 a month to Mrs. Brown)
- Flat Percentage (i.e., 44% of Mr. Brown’s disposable retired pay)
- Coverture Formula (i.e., 50% of the marital portion)
 - For Active Duty need to know:
 - Years of service as of Date of Marriage: _____
 - Years of service as of Date of Filing: _____
 - Years of service as of Date of Divorce: _____
 - For Reserve/Guard need to know:
 - Points as of Date of Marriage: _____
 - Points as of Date of Filing: _____
 - Points as of Date of Divorce: _____
 - **(COMPLETE points statement must be attached if this option is chosen)**
- 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 COLAs (cost-of-living adjustments.))

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

8. 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 SM/retiree dies.

- c. **IF RESERVE OR GUARD:** Reserve Component SBP (Survivor Benefit Plan) applies if one is in the Reserves or National Guard. Check (T) 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.

9. **TSP:** 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) What was the first date of contribution to the TSP: _____
- (3) 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.
