**Thrift Savings Plan (TSP) Intake**

Participant/Employee/Retiree Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Alternate Payee/Former Spouse Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please check which type of TSP account Participant has:**

 Civilian

 Uniformed Services

TSP#:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Alternate Payee/Former Spouse is awarded (check one):**

 % of TSP balance as of \_\_\_\_\_\_\_\_(Date of Valuation)

* If no date specified, TSP will assume the date Payee’s entitlement is determined based on the effective date of the order (future date).

 Dollar amount of TSP balance

 Fraction of TSP balance as of \_\_\_\_\_\_\_\_(Date of Valuation)

* If no date specified, TSP will assume the date Payee’s entitlement is determined based on the effective date of the order (future date).

**Date of Valuation**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Order can only award a specific dollar amount, fraction, or percentage of the participant’s account as of a specific past or current date.
* Usually DOV is the date of filing of initial pleadings, date of agreement, or date Final Order/Divorce is filed.

**Interest and Earnings** (check one): Neither interest nor earnings will be paid on the amount of the entitlement unless the court order specifically provides for them.

\_\_\_\_\_Payee **IS ENTITLED** to Interest and earnings on his/her portion of benefits from date of valuation to date of segregation.

\_\_\_\_\_Payee **IS NOT ENTITLED** to Interest and earnings on his/her portion of benefits from date of valuation to date of segregation.

**TSP Loan**: For purposes of computing a payee’s entitlement, the dollar amount of an outstanding loan **IS INCLUDED** in the account balance, unless the court order specifically provides otherwise.

**TSP processes a court order in 4 steps:**

Step 1: TSP receives Order, participant’s account will be frozen

Step 2: TSP evaluates Order and inform parties of changes to be made.

Step 3: Once TSP receives complete RBCO they will retain freeze on account and determine if RBCO is qualifying.

Step 4: TSP will mail decision letter to parties. Decision letter will describe when the freeze on account will be lifted and when payment will be made. Decision letter will also include information to Alternate Payee/Former Spouse about the option to transfer the payment to a traditional IRA, Roth IRA, or an eligible employer plan