

EASYQDROS ("pronounced Quadros ") **INFORMATION WORKSHEET**
2466 Baywood Court, Orange Park, FL 32065 Phone: 904 – 415-5282
Email us at: EASYQDROS@AOL.COM

(Use this Checklist to provide us the information needed to prepare your "QDRO" or other type of Division Order.)

Instructions: This Checklist will refer to the "Participant" as the employee participating in the retirement plan, and the "Alternate Payee" as the spouse/former spouse who is seeking to obtain his/her share of the retirement plan. We will contact you to confirm our receipt of this Checklist and to verify any information that may be needed. Mr. Gardner is a skilled QDRO drafting specialist with over 25 years' experience; so, your project will be handled quickly and professionally by Mr. Gardner personally!

Please answer as many questions as possible, to enable us to properly prepare your plan's QDRO as quickly as possible as incomplete information may slow the process; but, if you don't know something, just fill in the rest and we'll take care of it later. We will phone you to double check anything in doubt.

[**NOTE:** If you're requesting that we prepare documents to divide a Military Pension or IRA, skip #'s 7(a) & 7(b).]

1. **Participant's Information** (This is the Spouse/Former Spouse now participating in the retirement plan):

Name: _____
Address: _____
City, State, Zip - County: _____
SSN: _____ DOB _____ Ph. #: _____
Date of Entry into Plan: _____ Date of Exit (If applicable): _____
Email Address: _____ Date of Retirement (If applicable): _____

Once a divorce is final, you may not be using attorneys; If the Participant is still using one please give:

Participant's Attorney's Info. (If applicable): (☐) < **X here if Participant has no Atty. & go to #2.**

[If your divorce is final and you just need the QDRO, you may be finished with using your attorney]

Name: _____ Bar No. _____
Address: _____
City, State, Zip: _____
Atty's. Ph. #: _____ Fax#: _____ Email: _____

2. **Alternate Payee's Info.** (This is the Spouse/Former Spouse seeking to obtain their marital share of the money in the Participant's retirement account.):

Name: _____
Address: _____
City, State, Zip - County: _____
SSN: _____ DOB _____ Ph. #: _____
Email Address: _____

Once a divorce is final, you may not be using attorneys; If Alternate Payee is still using one please give:

Alternate Payee's Atty's Info. (If applicable): (☐) < **X here if Alt. Payee has no Atty. & go to #3.**

[If your divorce is final and you just need the QDRO, you may be finished with using your attorney]

Name: _____ Bar No. _____
Address: _____
City, State, Zip: _____
Atty's. Ph. #: _____ Fax#: _____ Email: _____

3. Are the Participant and Alternate Payee already divorced? Check one. (☐) No. (☐) Yes

4. Date of Divorce: _____ Date of Separation: _____ Date Married: _____

Date of Division (Valuation Date of Plan Assets for Division between parties as of): _____

5. Is Participant Currently receiving payments from the plan? **Check one.** () No. () Yes

6. Is any former spouse of the Participant entitled to Plan benefits through an existing "QDRO"?
Check one. () No. () Yes. () Don't know.

Skip questions 7(a) and 7(b) ONLY if this is for a Military Pension or an IRA account.

7(a) Please provide the following Information about the **Employer who offers this Plan:**

Employer's Name: _____

Address: _____

City, State, Zip: _____ Ph. # _____

7(b) **Employer's QDRO Contact** (This may be the same as the Plan Administrator information below or it may be a Human Resource Contact dedicated to handling requests related to the Plan. If it's the same, just enter SAME AS #8 BELOW on Contact's Name Line and skip to #8.):

Contact's Name: _____

Contact's Address (If different than above): _____

City, State, Zip: _____

Contact's Email Address: _____ Ph. # _____

8. **INFORMATION ABOUT THE PLAN ITSELF: Check here if this is an IRA Plan:** _____

Name of Plan: _____

Address of Plan: _____

City, State, Zip: _____

Administrator's Name: _____

Administrator's Email Address: _____ Ph. # _____

If this is a Military Retirement Plan: List the branch of service here: _____, And,
If this is a Military Retirement Plan involving "Reserve Duty" please enclose a copy of the last yearly "Points Statement".]

A COPY OF THE FOLLOWING IS NEEDED BEFORE THE QDRO WILL BE PREPARED:

A. Copy of a Statement for the retirement plan's account that is being divided.

(N/A for Military Retirement)

B. Copy of Final Judgment or the 1st and last page, plus any page related to the award from the PLAN (or, a Settlement Agreement, if available, and a Final Judgment isn't yet issued)

C. Payment for our drafting fee of just \$475.00 made payable to EASY-QDROS. You may pay by any one of the following credit cards: [Check one]: Visa _____ MasterCard _____, or Discover card _____, and you may then email us your Order for our fastest service. Just fill in your credit card information on the next page. Or, you may send it by U. S. Mail to us with your check or money order payable to EASYQDROS. All checks other than certified bank checks or cashier's checks must clear before work on the QDRO begins..

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EASYQDROS.COM AGREEMENT AND GUARANTEE FOR SERVICES

This Agreement sets forth the entire terms of the agreement for the services offered by EASY-QDROS.COM. Unless modified by mutual agreement, in writing, and signed by both parties, these terms will control all services to be rendered by EASY-QDROS. Where used, herein, "Division Order" refers to whatever type of such said order is required by the Plan, i.e.: "QDRO", "COAP", or in the case of an IRA, a "Letter of Instruction", etc: **One price covers everything: QDRO or other type division Order, Motion, if needed, and a Submission Letter to the Plan Administrator and a complete simple step-by-step instructions letter.**

Please complete the following: Name, Address, Phone, and Email address. The BAR# is only for an attorney.

The Contracting Client's name is: (Your name) _____

If Contracting Client is an attorney, Bar # is: _____

The Contracting Client's address is: _____

The Contracting Client's Phone Number is: _____

The Contracting Client's Email address is: _____

Contracting Client hereby agrees: One price covers everything: Quadro, Motion if needed, a submission letter and some simple step-by-step instructions, plus any telephone consultation needed.

1. They are contracting with EASY-QDROS for the sum of \$475.00 to draft an acceptable "Division Order," commonly called a QDRO, for Plan benefits to be divided out to an Alternate Payee from the said Plan.

2. That the Contracting Client is EASY-QDROS primary contact with reference to this project. In the unlikely event, a Division Order is not qualified by the Plan Administrator when first submitted, EASYQDROS will redraft the said Order, as necessary, **Guaranteed, at no extra charge** until it is acceptable to and approved by the Plan Administrator.

3. That the sum figure in Item 1, above, is a flat fee for Mr. Gardner's drafting services. and the said client should expect that the said order package will be completed **within 10 business days or less (average is 5 Days)* after receipt of all the necessary information and full payment for EASY-QDROS' drafting fee.**

4. Further, the complete QDRO package shall contain: **the QDRO, a Motion, if needed,** to get the Judge to sign the QDRO, and, **a submission letter** to the Plan Administrator when the client submits the judge's signed QDRO to the Plan Administrator for processing and payment **step-by-step instructions.** * (Personal checks must clear first.)

I understand and agree to the terms of the Agreement and the Guarantee. I've chosen to pay for this service in the following manner: [Check one]: Enclosed check: ____ or Money Order ____ made payable to EASY QDROS. Or, ____ I've furnished my credit card information below.

Name on card: _____ Card number: _____

Cardholder's billing address: _____

City, State, Zip code: _____

Expiration Date of card: _____ 3 or 4-digit verification code (on back): _____

Please sign here: _____ Date: _____

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