

# WFA ECONOMETRICS GROUP, L.L.C.

*A Forensic Economics Advisory Firm*

*Authors of Retirement Plan  
Benefits and QDROs in Divorce  
(a CCH Publication)*

## **QDRO CHECKLIST**

**Full Name of Parties:**

Petitioner: \_\_\_\_\_

Respondent: \_\_\_\_\_

Retained by:

Attorney for Husband

Attorney for Wife

Jointly/Appointed by Court

Complete, and most recent, **Addresses** of each party

Petitioner:

Respondent:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Social Security Numbers** of each party

Petitioner: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

Respondent: \_\_\_\_ - \_\_\_\_ - \_\_\_\_

**Dates of Birth** of each party

Petitioner: \_\_\_\_\_

Respondent: \_\_\_\_\_

**Date of Divorce** \_\_\_\_\_

**Date of Division** ("as of" date, e.g. date of filing/separation): \_\_\_\_\_

(Effective date of dividing retirement plan, as of date, and significance of effective date)

**Date of Marriage:** \_\_\_\_\_

**County & State of Action:** \_\_\_\_\_

**Case No.:** \_\_\_\_\_ *(not necessary if provided with case caption)*

**Name of Spouse with Pension/401(k):** \_\_\_\_\_

**Percentage/Dollar Amount of Award:** \_\_\_\_\_

**Precise Name of Plan:** \_\_\_\_\_

(Please Provide a Recent Copy of Account Statement/Benefit Statement.)

Copy of applicable portion(s) of

▪ Judgment/**Marital Settlement Agreement** specific to retirement benefits

(& front page – style of case)

▪ **Account Statement or Benefit Statement**

**Fee (\$400 to \$750 per QDRO)** (payable in advance or before commencement of work)

**Engagement Letter from Attorney or Attorney Contact information:**