

QDRO Information Form

Instructions: Please complete ALL items. The information and documents are necessary and we cannot complete your QDRO without all of this information and full payment, as set forth on page 4.

Information about the parties

Participant (employee) Name _____
Current address: Street _____ Apt. No. ____
City _____
State _____ ZIP Code _____
Date of birth: _____, 19__
Social Security number: ____ - ____ - ____
Telephone number: (____) ____ - _____ e-mail: _____

Alternate Payee (non-employee) Name _____
Current address: Street _____ Apt. No. ____
City _____
State _____ ZIP Code _____
Date of birth: _____, 19__
Social Security number: ____ - ____ - ____
Telephone number: (____) ____ - _____ e-mail: _____

Information about the marriage and divorce

Date of marriage: _____.
Date of separation: _____.
Date of divorce: _____.*

* check here __ if the parties are not yet divorced

Information about the attorneys

Participant's attorney Name: _____*
Address: Street _____ Suite No. ____
P.O. Box: _____
City: _____
State: ____ ZIP Code: _____
Telephone number: (____) ____ - _____ e-mail: _____

Alternate Payee's attorney Name: _____
Address: Street _____ Suite No. ____
P.O. Box: _____
City: _____
State: ____ ZIP Code: _____
Telephone number: (____) ____ - _____ e-mail: _____

You must provide the name of at least one attorney practicing in the State where your case was decided who will review and approve the QDRO we draft.

Information about the Plan(s) to be divided

Note: If more than one Plan is being divided, please photocopy this page and fill in the information below for each Plan. Please be precise. **For Military and Civil Service Plans, use next page.**

Name of Plan: _____
Name of employer: _____
Contact person at employer (not Plan): Name: _____
Address of employer: Street _____ Suite No. ____
P.O. Box: _____
City: _____
State: ____ ZIP Code: _____
Telephone number: (____) ____ - _____
e-mail address: _____@_____.

Date Participant began working for the employer: _____, ____
Date Participant stopped working for employer (if applicable): _____, ____
Is Participant retired? ___ Yes ___ No
Is Participant currently receiving payments from the Plan? ___ Yes ___ No

At the time of Participant's retirement, did the Participant elect survivor benefits for the Alternate Payee? Yes No Not sure.

Military and Civil Service Plans

If Plan being divided is a **military Plan** check here and fill in:

Branch of service: Army Navy Air Force Marines Coast Guard

Date of entry into military service: _____

Current rank: _____

Rank at retirement (if retired): _____

Date of retirement (if retired): _____

If service member is already retired, was Survivor Benefit Plan (SBP) coverage obtained at retirement? Yes No Don't know

Does service member participate in Thrift Savings Plan? Yes No Don't know

****If pension being divided is a military reserve service pension, points record MUST be attached.****

If Plan being divided is a Federal or State civil service Plan check here: and fill in:

Name of Federal or State agency where employed: _____

Date of retirement (if retired): _____

If employee has already retired, was Former Spouse Survivor Annuity (FSSA) coverage elected at retirement? Yes No Don't know

Does employee participate in Thrift Savings Plan? Yes No Don't know

Documents to Send With This Form

Divorce decree (if parties are already divorced) or decree of separate maintenance. (If parties are not yet divorced or legally separated, provide a copy of the first page of any court pleading)

Separation Agreement or Court Order showing the share of benefits awarded to the Alternate Payee. You may enclose a copy of the full Agreement or Court Order, or just the first and last pages and any pages dealing specifically with the retirement Plans.

Copy of all documents or correspondence relating to the Plan, including:

- Summary Plan Descriptions or booklets describing the Plan*
- Most recent account statements for the participant (employee)
- The Plan's Written QDRO Procedures*
- All correspondence from the Plan or employer

* Not required for military retired pay or Federal civil service divisions

Additional instructions or comments. If there is any additional information you feel we should know about this case or the QDRO you are requesting us to draft, or any additional comments or instructions, please note them in the space below. You may continue your comments and instructions on a separate piece of paper if necessary.

Fees and services

Our fee is \$760.00 per Plan. **PAYMENT IN FULL MUST BE SENT, ALONG WITH THIS COMPLETED FORM, BEFORE WE CAN BEGIN PROCESSING YOUR REQUEST.** Please make your check payable to “QDRO Solutions, LLC” and mail it to us at the address shown below. If there are multiple Plans, please send \$760.00 for each Plan you wish us to draft. Our fees cover drafting the QDRO, corresponding with the Plan about the terms of the QDRO and revising the QDRO, as necessary, until it is accepted by the Plan. Please note that if you have not yet negotiated an Agreement, it would be helpful to hire us as soon as possible regarding information to include in the Agreement; but, once the Agreement is completed, we do not and cannot re-negotiate the Agreement. QDRO’s are usually drafted within 2 weeks after we receive the payment, Information Form and all of the documents we need; although, this may take longer being signed by the Court and from that point to its ultimate acceptance by the Plan will inevitably take much more time. We will proceed expeditiously and, if there is going to be a delay, we will let you know. We do not represent individual clients in Court and the use of our QDRO-drafting service does not create an attorney-client relationship.

**Attorney representing client who is
requesting the QDRO**

NOTE: WE ARE NOT HIRED AS A JOINT EXPERT, EVEN IF THE PARTIES AGREE TO SPLIT THE FEES FOR HIRING US. THE ATTORNEY OR PARTY WHO SUBMITS THIS FORM SHALL BE OUR CLIENT AND SHALL BE THE PERSON WHO HAS HIRED US TO PREPARE THE APPROPRIATE ORDERS AND THEREFORE WILL BE THE ONLY PERSON WITH WHOM WE COMMUNICATE REGARDING THE QDRO’S WE DRAFT AND THE CONTENTS THEREIN.

Thank you for selecting QDRO Solutions, LLC to assist you in preparing your QDRO.

QDRO Solutions, LLC
Post Office Box 882
Charleston, SC 29402
(843) 224-5720
Fax (843) 577-9826
E-mail: info@qdrosolutions.net

What is a QDRO? Why do I need one now?

• **QDRO** stands for “**Q**ualified **D**omestic **R**elations **O**rders”. This is a special kind of Court Order which is used to divide pension rights between divorcing spouses, or to collect alimony or child support from a pension or employee benefit Plan.

• **What types of pension Plans are subject to QDRO’s?** All types. Private (corporate) pension and benefit Plans such as 401(k), 403(b), 457, defined benefit monthly payment, TIAA/CREF, etc. may be divided by QDRO’s under a Federal law called “ERISA”. Military retired pay, Federal and State civil service Plans, and IRA’s may be divided by similar orders.

• **How do QDRO’s work?** The State divorce court first enters an Order dividing a pension. This State Court Order may be entered after a contested hearing, or by mutual agreement of the parties. The Order must also be approved by the pension Plan before it becomes effective. Your rights are not protected and you will not receive anything under the State Court Order until and unless the Plan has reviewed and accepted the Order.

• **Why should I get a QDRO now? Why can’t I wait until my former spouse retires or until I need the money?** If you delay in obtaining a QDRO, you may lose valuable rights and run the risk of forfeiting all of the benefits awarded to you in your divorce. Your rights may be lost if your former spouse does any of the following before your QDRO is submitted to the pension Plan and accepted by the Plan:

- retires
- remarries
- dies
- quits or is fired
- withdraws funds from the Plan before retirement
- takes out a loan secured by the Plan account

• **What is QDRO Solutions, LLC?** We are a pension division consulting firm operated by an experienced Family Law attorney. QDRO Solutions, LLC prepares pension division Orders for all types of Plans – corporate, military, civil service, etc. We draft QDRO’s, send them to the Plan, and make any amendments required by the Plan until the QDRO is accepted by the Plan. We do not represent individual clients in Court or renegotiate settlements. All our work is done on a fixed fee basis of \$760.00 per Plan.

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