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CLIENT CREDIT CARD PROCESSING FORM

Please Fax this form to (303) 231-1033

Account Section:

Account Number: _____

Expiration Date (MMYY): _____

Amount: _____

CVC2 (security code): _____

Billing Address:

Company: _____

First Name: _____

Last Name: _____

Address 1: _____

Address 2: _____

City: _____

State/Province: _____

Zip Code: _____

Telephone No.: _____

QDRO FEE SCHEDULE

Qualified Domestic Relations Orders (QDRO)

<input type="checkbox"/> Defined Contribution Plans (401(k), 403(b), 457 Plans, etc)	\$600
<input type="checkbox"/> Defined Benefit Plans (Pension Plans, Cash Balance Plans)	\$600
<input type="checkbox"/> IRA Domestic Relations Order	\$600

Federal Retirement Systems and Military Plans

<input type="checkbox"/> Military, Coast Guard and Reservist Plans	\$600
<input type="checkbox"/> CSRS and FERS	\$600
<input type="checkbox"/> Federal Thrift Savings Plan (TSP)	\$400
<input type="checkbox"/> Tier II Railroad Retirement Benefits	\$600

Public and State Sponsored Plans

<input type="checkbox"/> Public Employee Plans	\$600
<input type="checkbox"/> Teacher's and University Retirement Systems	\$600
<input type="checkbox"/> City and County Employee Plans	\$600
<input type="checkbox"/> Colorado PERA/Fire & Police Pension Association of Colorado (FPPA)	\$400

Multiple QDRO Discount

- 2nd QDRO for same case is \$500
(i.e. Pension QDRO and 401(k) QDRO would total \$1,100)
- 3rd QDRO and each additional QDRO is \$400
(i.e. Pension QDRO and two 401(k) QDROs would total \$1,500)

Please contact us with any questions regarding our fees