QDRO
SPECIALISTS OF COLORADO

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Thank you for retaining our company to prepare your Qualified Domestic Relations Order "QDRO". We look forward to working with you and strive to make the QDRO process as smooth and efficient as possible. Our **QDRO Information form** asks for much of the information we will need to prepare your QDRO or division order. It is designed to be a "catch-all" for every QDRO request we receive and completing all the requested information may not be necessary for your particular situation. Here are some "tips" for completing the QDRO Information Form:

- Please provide the ***current addresses for the parties***. If you will be moving or changing addresses, please also provide the future address, so that the final QDRO may contain your proper address, as the retirement plan(s) will be sending important information to everyone during the QDRO process and thereafter.

- If you are represented by an attorney, please list their information where asked, so that we may copy them on the QDRO and all correspondence related to the division of the retirement plan(s). If you ***are not*** represented by an attorney, you may leave that section blank. If your attorney has withdrawn from your case, please indicate as such and provide us with their Notice or Letter of Withdrawal.

- Please complete the Information on Retirement Plan(s) section to the best of your knowledge. "Fidelity", "Charles Schwab", "Vanguard", etc. are Plan Custodians and are rarely the actual Plan Administrator. If unsure, please list the employer which the retirement plan was accumulated under, with a contact phone number, so that we can then research the specific information on the Plan Administrator. If this information is incomplete, please be aware that extra time on our end may be needed on locating and communicating with the appropriate Plan Administrator who will review and process the QDRO, and may delay the completion of the QDRO beyond our standard turnaround times.

- For 401(k) Plan QDROs and other defined contribution plan QDROs, a statement really helps identify the Plan, and critical information such as Plan Loans, and whether the account is being actively contributed to, and is why we ask for this statement.

- For Pension Plan QDROs, statements usually are not generated on a regular basis, and may need to be requested from your H.R. representative or benefits center.

- **Name Change:** Please provide us with the full and proper name that should appear in the QDRO. If your name has been changed or restored in your Decree, this should be provided.

Questions? We are here to help! Please feel free to call Geena, our Case Coordinator, at **(303) 345-7535**, or email: **info@qdrospecialist.com**

QDRO Information Form

(* Denotes Required Information)

1. Participant (employee):

* Name:______________________________

(Please Call In with SSN)

* Social Security Number: _ _ _ - _ _ - _ _ _ _

* Date of Birth: ______________________________

* Street Address: ______________________________

* City: ______________________________

* State: ______________ * ZIP Code: ______________

Telephone: ______________________________

* E-mail: ______________________________

Participant's Attorney:

Name: ______________________________

Firm Name: ______________________________

Street Address: ______________________________

City: ______________________________

State: ______________ ZIP Code: ______________

Telephone: ______________________________

FAX: ______________________________

E-mail: ______________________________

Paralegal E-mail: ______________________________

2. Alternate Payee (non-employee):

* Name:____

* Social Security Number: _ _ _ - _ _ - _ _ _ _ (Please Call In with SSN)

* Date of Birth: ____

* Street Address: ____

* City: ____

* State: _____________ * ZIP Code: _________________

Telephone: ___________________________________

* E-mail: ____

Alternate Payee's Attorney:

Name: ____

Firm Name: ____

Street Address: ____

City: ____

State: _____________ ZIP Code: ________________

Telephone: ___________________________________

FAX: ____

E-mail: ____

Paralegal E-mail: ____

3. Information about the Divorce:

* Date of Marriage: ______________________________

* Date of Decree (Divorce or Legal Separation): _____________________________
(If Granted at this time)

(* Denotes Required Information)

4. Information about the Retirement Plan(s) <u>that will be divided</u>:

<u>Note:</u> If more than one plan is being divided, please photocopy this page for additional plans, or provide the information on a separate sheet of paper.

* Name of the Plan: ______________________________

* Name of Employer: ______________________________

Name of Plan Administrator: ______________________________

Plan Admin Email Address: ______________________________

Plan Mailing Address: ______________________________

____

* Plan Telephone: ____________________ Plan Fax: ____________________

Date Participant began working for the employer: ____________________

Is the Participant still working for this employer? Yes ☐ / No ☐

<u>For Defined Contribution Plans (i.e. 401(k) Plans, etc.):</u>

Is there a loan outstanding? Yes ☐ / No ☐

If so, was the loan used for a marital purpose? Yes ☐ / No ☐

<u>For Defined Benefit "Pension" Plans:</u>

Is the Participant retired and receiving benefits from this Pension Plan? Yes ☐ / No ☐

If retired under a Pension Plan, did the Participant elect survivor benefits for the Alternate Payee at the commencement of benefits? Yes ☐ / No ☐ / Unsure ☐

5. Documents

- ☐ A copy of the Separation Agreement / Marital Settlement Agreement (actual or proposed) or Judgment of Divorce that deals with the division of the retirement benefits. You may send the whole copy or just the first and last pages and any pages dealing with the retirement plans.

- ☐ Recent retirement plan account statements or benefit statements for the Participant (If available)