

Information Needed to Do a QDRO

Name of Retirement Plan to be divided: _____
Type of Retirement Plan: ___ 401(k); ___ Defined Benefit: _____ Other
If a Defined Benefit Plan, is the Alternate Payee (new owner) to be provided with a survivor benefit if the Participant (plan owner) dies before the Alternate Payee? ___ Yes; ___ No; ___ Not Know
Does the Participant (plan owner) presently have a loan from the plan? ___ Yes; ___ No
Name of the sponsoring employer: _____
Contact name and phone number at the employer, such as Human Resources: _____

Name of the Retirement Plan Owner/Participant/Employee: _____
Date of Birth: _____; Social Security Number: _____
Present Home Address: _____

Daytime Telephone: _____
Email Address: _____
Is the Participant/Employee now represented by an attorney? ___ Yes; ___ No

Name of the New Owner/Alternate Payee: _____
Date of Birth: _____; Social Security Number: _____
Present Home Address: _____

Daytime Telephone: _____
Email Address: _____
Is the New Owner/Alternate Payee now represented by an attorney? ___ Yes; ___ No

Date of Marriage: _____

Documents needed:

1. Copy of the Divorce Decree, if it has been finalized by the court;
2. Copy of the Separation Agreement or Permanent Orders, which lists the plan being divided;
3. Copy of the Summary Plan Description, if you have it. Otherwise we will get it;
4. Copy of a recent retirement plan account statement;
5. Signed Authorization to Release Financial Information, so that we can get information from the plan administrator; and
6. Signed Fee Agreement, with payment of the fee.

Contact Information:

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