

QUALIFIED DOMESTIC RELATIONS ORDER CHECKLIST SUBMITTED BY INDIVIDUALS

CONTACT INFORMATION:

First Name:

Last Name:

Phone #:

Email address:

Should ex-spouse be copied on our correspondence? Yes No

If yes, provide their email address:

PARTICIPANT INFORMATION: (the one who currently holds the account)

Name:

Phone Number:

Street Address:

City:

State:

Zip:

Date of Birth:

Social Security Number:

ALTERNATE PAYEE INFORMATION:

Name:

Phone Number:

Street Address:

City:

State:

Zip:

Date of Birth:

Social Security Number:

MARRIAGE INFORMATION:

Date of Marriage:

Date Marriage Ended:

Date of Divorce:

PLAN DETAILS:

Participant's Employer or previous employer (related to this account):

Plan Name:

Type of Plan: 401K Pension 403 457 Military Other

Plan Administrator:

Plan Administrator Contact (email or phone #):

**** If you are not sure about this information call the employers Human Resource Department and ask for plan name, plan administrator and plan documents, preferably in a form they can email to you.**

DISTRIBUTION DETAILS:

How are benefits to be paid? Percentage or \$ Amount

If Dollar Amount : \$

If Percent: %

Using what Method:

Marital Portion

Specific Date

Date Marriage Ended

Other

What is the approximate account balance before division, if known?

Except for Pension Plans – should gains/losses from division to segregation be included? YES or NO

Except for Pension Plans – should loan balances be included or excluded?

Included or Excluded

Pension Plans ONLY – Is the participant already retired and receiving payments?

YES or NO

COURT CASE INFORMATION:

Name of Plaintiff/Petitioner:

Name of Defendant/Respondent:

State where filed:

County where filed:

Case #:

Will both Participant and Alternate Payee sign the QDRO (recommended)?

YES or NO

Do you need the lawyers signatures on the QDRO (not common)?

YES or NO

Anything else you think we should know – attach additional pages as necessary:

How did you hear about us?

NOTES:

- Include following items with this questionnaire:
 - a. Benefit account statement (if available but not required)
 - b. Plan summary or booklet (if available but not required)
 - c. Divorce decree or settlement agreement (**ONLY THE FIRST PAGE** and the **PAGE THAT DISCUSSES THE RETIREMENT DIVISION** as we do not need to see the entire document.

- Full payment is due when the QDRO checklist is submitted to QDRONOW.COM. Payments may be made by credit or debit card by simply filling out the credit card form on the last page of this questionnaire. If you prefer to pay by check or money order, please contact our office so arrangements can be made.

- Further, by submitting this form to QDRONOW you agree and understand that we are a financial firm specializing in the preparation of QDRO's and not a law firm and cannot provide you any legal advice.

- We draft the QDRO based on the information you provide us. Please note that we do not give legal advice or legal services. Our draft QDRO cannot be construed as legal advice. It is best to seek legal advice to determine QDRO settlement agreement compliance and state law compliance.

SEE NEXT PAGE

\$545/QDRO. Fee includes \$495 QDRO fee *plus* a \$50 processing fee for not submitting the request online. If you would like to avoid the \$50 fee submit the online QDRO request form at www.qdronow.com.

By submitting this form you hereby agree to the Terms & Conditions which are found at the www.qdronow.com and make it very clear that we are a financial firm specializing in QDRO's and not a Law Firm representing you as an attorney.

Type of Card (Visa, MC, AmEx)

Credit Card Number

Exp. Date

Cardholder Name

Security Code on back (front if Amex)

Cardholder daytime phone

Cardholder Address

City State Zip

Promo Code (if any)

Signature:

If you are filing a QDRO in the state of Florida and have not been referred to us directly by your attorney you must understand that we are legally limited to solely "filling in the blanks" of a model QDRO and are not able to provide any legal advice whatsoever. We are a financial services firm providing not only the preparation of the QDRO document, but also the coordination and tracking of the document through the preapproval process with the plan. The most tedious part of the QDRO process is the initial communication with the Plan Administrator as well as the follow through to ensure they timely pre-approve the QDRO. We can assist with the financial calculations required of a QDRO as well. Utilizing the model QDRO is often the better way to do a QDRO anyway because many Plans will charge a higher fee for reviewing the QDRO if you utilize a custom form. Again, we are happy to assist you with the QDRO process but the Florida Bar requires this disclaimer so that it is clear exactly what our role as a QDRO provider is. We look forward to serving your QDRO needs and you can proceed to submit the request to us at the address below.

Return completed form to:

QDRONOW.COM
Robert@qdronow.com
Phone (904) 564-1000
FAX (904)531-3003

By submitting this QDRO request you acknowledge that you require a QDRO be prepared. If for some reason during our research we determine that a QDRO is not required or you for some reason decide you do not want us to complete the QDRO, there are NO REFUNDS.