

Information Needed to Do a QDRO

1. 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: _____

2. Name of the Retirement Plan Owner/Participant/Employee: _____
First, Middle, and Last Name
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 Attorney: _____

3. Name of the New Owner/Alternate Payee: _____
First, Middle, and Last Name (was name changed in the divorce?)
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
Name of Attorney: _____

4. Date of Marriage: _____; Date of Divorce Decree: _____

5. 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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