Q D R O S O U R C E

FORM A **Application for QDRO Preparation**

For questions contact bob@qdrosource.com or (866) 375-3611 Rev: 03.23.2025

- *To minimize transcription errors, please enter data in sentence case, **save** file (do not print to pdf) and **upload (or email bob@qdrosource.com) digital file** to QDRO Source secure Document Folder.*
- *Include copy of decree / property settlement agreement and any plan information or statements.*
- *For prompt completion of your documents, we need all the requested identification information. To the extent this data is available in the documents provided, you need not enter it on this Application form.*

PART I **Requesting Counsel: (if not included in the documents submitted)**

1. Name Not Applicable	2. Firm	3. Street Address	4. City, State ZIP
5. Legal Assistant	6. Phone	7. Fax	8. Email

PART II **Your Information: (if not included in the documents submitted)**

1. Client Name (Current) Your Name	2. Name Changed to:	3. Street Address, City, State Zip	
4. Client is: Petitioner ☐ Respondent ☐	4. SSN	5. Date of Birth	optional 7. Phone #: 8. Email:

PART III **Spouse's Counsel: (if not included in the documents submitted)**

1. Name	2. Firm	3. Street Address	4. City, State Zip
5. Legal Assistant	6. Phone	7. Fax	8. Email

PART IV **Your Spouse Information: (if not included in the documents submitted)**

1. Spouse's Name Your (ex-) spouse's name	2. Name Changed to:	3. Street Address, City, State Zip	
4. SSN	5. Date of Birth	If available: 6. Phone:	7. Email:
Part V **Marriage:**	8. Date of Marriage	9. Date of Divorce	

PART VI **Plan Information – List the formal plan name for which a QDRO is required**
One QDRO will be prepared per Plan. List any additional plans on an attachment.

If the complete employer/plan information is not available, please provide at least the employer's correct name and telephone number.
A recent copy of statement participant's plan account would be helpful but is not required.

Participant (Employee) is	Sponsoring Employer of plan (Name, Address)	Work prior to marriage	Plan Name (List additional plans on separate sheet.)	Plan Administrator / Recordkeeper (Name, Contact) (From account / benefit statement or Summary Plan Description)
Client ☐ **Spouse** ☐		Yes ☐ No ☐		
Client ☐ **Spouse** ☐		Yes ☐ No ☐		
Client ☐ **Spouse** ☐		Yes ☐ No ☐		

PART VII

Fee

Multiply Box 1 by $500.00 and Remit:	1. **# QDROs Requested:**	2. **Total Due:**

If expedited, (eight business hours), add $150.00

1. Zelle to robert.noble@qdrosource.com,
2. Mail Firm check, money order or cashier check (no personal checks please) to above address, **OR**
3. Request envoice for credit/debit card payment (card service fee applies).

Part VIII Division information:	
Date division / valuation as of:	
Defined Contribution plans (401k, profit sharing, IRC 457 or 403(b)):	
Attribute Gain and Loss from valuation date to segregation	Yes ○ No ○
Outstanding Participant Loans	Included in account balance <u>only</u> for purpose of calculating % award, not distributed to Former Spouse. Yes ○ No ○
Plan Administrator fee (Some plan administrators charge a fee to Participant's account to process QDRO)	Allocated 100% to Participant account ☐ Allocated 100% to Alternate Payee Award ☐ Split (50/50) ☐
<u>Defined Benefit plans</u> (pension): If Participant has not yet commenced, QDRO will be drafted as a "separate interest" payable over life of Alternate Payee, if available, unless otherwise.instructed.	Participant has commenced retirement annuity: ☐ Include Cost of Living Adjustment if provided by Plan: ☐

PART IX **Military DRO Only:** **If possible, please provide a copy of Member's Active or Reserve chronological service credit**

Branch	Dates of Service		Rank / grade		Active ☐ Reserve ☐ # Reserve Points accumulated during marriage:	Date Retired
	Beginning	Ending	Marriage	Divorce		

Assign Armed Services Survivor Benefit Plan (Cost must be charged to Member's disposable retired pay; former spouse may periodically reimburse Member directly). ☐

Currently Receiving Disposable Retired Pay: ☐

If divorce prior to commencement of disposable pay, provide:

- "High three" pay
- Marital service credit or Total Reserve Points for Retirement (REQUIRED).

QDRO SOURCE

6870 Catalina Ln., Frisco, Texas 75036
(866) 375-3611
www.qdrosource.com

Request Process

Thank you for your interest in QDRO document preparation by QDRO SOURCE. This packet is designed to help you with the most timely and accurate completion of your Qualified Domestic Relations Orders.

This package is for individuals not represented by an attorney and assumes:

1. **You have an enforceable property division awarding an interest in a retirement plan;**
2. **You will be responsible for presenting the final document to all other parties and their attorneys;**
3. **You will be responsible for submitting the order, whether agreed or not, to the Court for entry;**
4. **You will be responsible for transmitting the certified copy of the entered order to the plan administrator using the transmittal letter provided.**

If you have negotiated the division and are ready to complete your QDRO Request but have not requested these documents, you may send the minimal information outlined below (1-4) to have the QDRO prepared immediately or request QDRO SOURCE to collect any additional information needed (any fees required by the plan administrator must be paid by the requesting firm).[1]

One QDRO will be prepared per Plan, per Alternate Payee.

Your completed QDRO and associated letters will be emailed to you in an electronic file in Adobe® PDF format[2]. The file is ready to print hard copies and can be emailed to interested parties as an attachment.

For timely and accurate completion of your requests, please eupload the folloowing to your assigned Document Folder:

1. **Completed QDRO Source "Application for QDRO Preparation" Form A,**
2. **Copy of Final Decree of Divorce (final draft ok) or settlement agreement describing division of plan benefits, we need only the heading/caption, the dispositive provisions relating to plan interests and the execution page,**

If available, please provide copies of the following:

1. Completed Plan Information Questionnaire from the Plan Administrator
2. Copy of the Summary Plan Description
3. Copy of administrator's written procedures adopted for processing QDROs and sample forms (if available)
4. Copy of each Plan document (pre-printed boilerplate) and Adoption Agreement (menu of choices of optional plan provisions, if applicable)
5. Copy of participant's current plan account valuation.

If you have any questions, comments or special requests, please e-mail us at info@qdrosource.com. You can also get information on the request process at our website: www.qdrosource.com or call us at (866) 375-3611.

[1] QDRO SOURCE will request materials from plan sponsors / administrators (any fees paid by requesting firm) and will complete the draft QDRO within three business days of receipt of all required documents.
[2] PDF files can be read and printed using Adobe® Acrobat® Reader®. It can be downloaded free at www.adobe.com.
[3] In accordance with a recent interpretative change by the Dept. of Labor, some plan administrators have adopted a fee for processing a QDRO. This fee is not included in our preparation fee and will be charged by the administrator, generally against the participant's benefit before division.

Keeping It Simple

or

How to Get Your QDRO in Three Days (or less)!

(Our current record including plan approval is 3.75 hours)

1. Completing the "**Application for QDRO Preparation**" Form A:

    a. We must have **all** the requested identification information (Parts II &- IV). To the extent this data is available in the documents provided, you need not enter it on the Application form. Although much of this info is often included in the Final Divorce Decree; the dates of birth and date of marriage are generally not included, please provide them with your submission.

    b. The Division Date (Part IV, 7.) is assumed to be the date of entry by the court, unless otherwise indicated in Part IX.

    c. The employer and plan information requested in Part VI is normally available in an "Identification" section in the plan's Summary Plan Description. If you provide this document, you need not duplicate the detail in Part VI. The participant/ spouse should provide a copy of this document either from personal files or from his/her employers. If not available informally, this is among the documents requested by our "Plan Information Questionnaire" form, which should be incorporated into your discovery plan.

    d. If the complete employer/plan information is not available, please provide at least the employer's correct name and headquarter city (from IRS Form W-2) or telephone number. Our number one delay is determining the correct information about the plan and administrator.

    e. Review the Application for any omitted information.

2. When plan procedure allows, we submit the draft QDRO to the plan for review. We then address the plan administrator's reservations and comments directly and provide you with an approved final order, ready to present to the court. The plan administrator will take the time it requires either before or after entry by the court. While this process can add from one day to two months (depending on the diligence of the reviewer) to the time before the order is entered by the court, it is much more efficient than asking the court to enter corrected orders. The time saved is that of the court and presenting counsel. If your time frame will not allow, please advise.

3. You are our client. Unless specifically instructed otherwise, drafting options are resolved in your interest.

4. Our fee includes addressing your questions; take advantage of this service. The only ignorant question is the one not asked!

5. If you have special needs, discuss them with us, we will accommodate whenever possible.