Q D R O S O U R C E

6870 Catalina Ln., Frisco, Texas 75036

FORM A **Application for QDRO Preparation**

For questions contact bob@qdrosource.com or (866) 375-3611 Rev: 04.03.2020

- *To minimize transcription errors, please enter data using any PDF filler app in sentence case, save file and* ***email digital file*** *to QDRO Source.*
- *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	2. Firm	3. Street Address	4. City, State ZIP
5. Legal Assistant	6. Phone	7. Fax	8. Email

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

1. Client Name (Current)	2. Name Changed to:	3. Street Address, City, State Zip	
4. Client is: ☐ Petitioner ☐ Respondent	5. SSN	6. Date of Birth (MM/DD/YYYY)	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 **Spouse Information (if not included in the documents submitted)**

1. Spouse's Name	2. Name Changed to:	3. Street Address, City, State Zip	
4. SSN	5. Date of Birth (MM/DD/YYYY)	6. Date of Marriage (MM/DD/YYYY)	7. Date of Divorce (MM/DD/YYYY)

PART V **Please provide a digital copy of decree or property settlement document including caption.**

PART VII **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 (From account / benefit statement or Summary Plan Description)	Plan Administrator / Recordkeeper (Name, Contact) (From account / benefit statement or Summary Plan Description)
☐ **Client** ☐ **Spouse**		☐ **Yes** ☐ **No**		
☐ **Client** ☐ **Spouse**		☐ **Yes** ☐ **No**		

PART VIII	1. **# QDROs Requested:**	Multiply Box 1 by $395.00 Mail Firm check, money order or cashier check (no personal checks please) to above address or request envoice for credit/debit card payment (3% card service fee applies).	2. **Total Due:**

Part IX Division information

Date division / valuation as of:	(MM/DD/YYYY)

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 only for purpose of calculating award (not distributed). 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: ☐ % to Client

Defined Benefit plans (pension):
If Participant has not yet commenced, QDRO will be drafted as a "separate interest" payable over life of Alternate Payee, unless instructed other wise.

Participant has commenced payment of retirement annuity: ☐
Include Cost of Living Adjustment if provided by Plan: ☐

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

Service Member is	Branch	Dates of Service (YYYYMMDD)		Rank / grade		Active ☐ Reserve ☐ Points accumulated during marriage:	Date Retired (YYYYMMDD)
		Beginning	Ending	Marriage	Divorce		
☐ Client ☐ Spouse							

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

Currently Receiving Disposable Retired Pay: Yes ☐ No ☐
If retired prior to entry of divorce, provide "High Three" pay and marital service credit (required).

When completed, save file then attach to email to intake@qdrosource.com with copy of decree / property settlement agreement and any plan information or statements.