

Referred By: _____

QDRO QUESTIONNAIRE

1. Your Full Name: Mr. ___ Ms. ___ _____
2. Your Ex Spouse's Full Name: Mr. ___ Ms. ___ _____
3. Who is the Plaintiff? _____
4. Who owns the Retirement Plan? _____
5. Your Date of Birth: _____
6. Your Social Security Number: _____
7. Your Ex Spouse's Date of Birth: _____
8. Your Ex Spouse's Social Security Number: _____
9. Your Full Mailing Address:

10. Your Ex Spouse's Full Mailing Address:

11. Date of Marriage: _____
12. Date of Divorce: _____
13. In what state were/are you divorced/divorcing? _____
14. Date of Separation (or the date the benefit is to be computed): _____
15. **PLEASE ATTACH** a copy of the underlying Order or Decree permitting the division of the account by Qualified Domestic Relations Order.
16. Name of Employer: _____
17. Employer identification number for plan, if known: _____
18. What is the full name of plan? _____
19. Type of plan (defined benefit, defined contribution, etc. _____
*If this is a 401(k), 403(b), or annuity, you contribute money into an account
a. If it's held with TIAA/CREF. List the TIAA/CREF account number(s): _____
20. Date of first contribution: _____
21. Based on the years of service, the earliest date the employee could receive full retirement

benefits: _____

22. Employee's total years of service as plan participant: _____ ;
and the exact dates of that participation: _____

23. Were there any pre-marital contributions? YES ___ NO ___

If YES, what was the balance on the date of marriage? _____

What was the average annual rate of return on the account from the date of marriage to the
date of valuation (divorce/separation)? _____

24. Has participant taken any loans or made any withdrawals, excluding withdrawals on
termination of employment that the participant has completely repaid under Internal Revenue
Code Section 411(a)(7)(C)? YES ___ NO ___

If YES, who is responsible for the loan?: _____

25. Are gains and losses to be applied to Ex Spouse's share? YES ___ NO ___

26. If Spouse/Ex spouse dies before Participant, does the Spouse/Ex spouse want the benefits to
go to his/her estate? (this only applies to pensions and not defined contribution plans)

YES ___ NO ___

27. If the Retirement Plan charges a fee to review the QDRO, who is responsible for the fee? Or
are the parties going to split the review fee? _____

28. Normal Retirement Age: _____

29. Early Retirement Age: _____

Your Contact Information:

E-mail address: _____

Cell Phone: _____ Home Phone: _____

Please scan and email this form along with any other pertinent information to:
qdro@qdromasters.com, Fax to: (702) 438-5311, or Mail to:

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