Send or Scan Form, Data and Fee
Pension Analysis Consultants, Inc.
8215 Forest Avenue, P.O. Box 7107
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pac1@pensionanalysis.com

PAC®

PENSION ANALYSIS CONSULTANTS, INC.
www.pensionanalysis.com

Contact Us
Phone: (215) 782-9845
(800) 288-3675
Fax: (215) 782-9852
(888) 782-9852

NEW JERSEY VALUATION REQUEST FORM 2018

PARTICIPANT INFORMATION (EMPLOYEE SPOUSE)			
PARTICIPANT NAME		☐ *FEMALE* ☐ *MALE*	
PARTICIPANT BIRTH DATE	/ /	DATE OF MARRIAGE	/ /
HIRE DATE	/ /	MARITAL CUTOFF/SEPARATION	
PLAN ENTRY DATE	/ /	DIVORCE COUNTY	
EMPLOYER		PLAN NAME	
CURRENT EMPLOYMENT STATUS	☐ *ACTIVE AT PLAN*	☐ *TERMINATED* / /	☐ *RETIRED* / /

NON-EMPLOYEE SPOUSE INFORMATION			
NON-EMPLOYEE SPOUSE NAME		*BIRTH DATE* / /	☐ *FEMALE* ☐ *MALE*

REQUESTING PARTY		
ATTORNEY		REPRESENTS ☐ *EMPLOYEE* ☐ *SPOUSE*
FIRM NAME		
ADDRESS		
EMAIL		PHONE:

SERVICE REQUESTED (CALL PAC FOR RUSH SERVICE AVAILABILITY)		
STANDARD SERVICE 10-14 BUSINESS DAYS ☐	REGULAR RUSH (4-7 DAYS) $75 ☐	PRIORITY RUSH (24-48 HOURS) $125 ☐
INTEREST RATE TO BE USED ☐ *IRC* *OR* ☐ *PBGC* *{IF NO RATE IS CHOSEN BY THE REQUESTOR IRC WILL BE UTILIZED }* *(PBGC GIVES A HIGHER VALUE)*		
☐ DEFINED BENEFIT PLAN VALUATION	STATEMENT OF ACCRUED BENEFIT PAYABLE AT NORMAL RETIREMENT	$220
☐ MILITARY PENSION (ACTIVE)	BASE PAY/RANK {RESERVES-POINTS HISTORY}	$220
☐ FEDERAL PENSION	HIGH THREE SALARY AND CONTRIBUTIONS	$220
☐ SOCIAL SECURITY OFFSET	WAGE HISTORY OF EMPLOYEE/NONEMPLOYEE	$340
☐ **JOINT AND SURVIVOR*	OPTION TAKEN AT RETIREMENT	$120*
☐ **ADDITIONAL INTEREST RATE OR CUTOFF DATE*		$125 PER ADDITION*
☐ **VERBAL CRITIQUE OF OPPOSING VALUATION* **WRITTEN CRITIQUE*		$100* $300/HOUR WITH RETAINER
☐ DEFINED CONTRIBUTION VALUATION (401(K), 403(B), TIAA-CREF, TSP, STOCK OWNERSHIP • STARTED BEFORE THE MARRIAGE • STARTED AFTER THE MARRIAGE	PRE MARRIAGE: QUARTERLY STATEMENTS FROM SEPARATION TO PRESENT AFTER MARRIAGE: STATEMENTS FROM DATE OF MARRIAGE TO PRESENT	BEFORE MARRIAGE: $500 AFTER MARRIAGE: $300
*IN ADDITION TO THE STANDARD REPORT, IF NEEDED INDIVIDUALLY A FULL FEE WILL APPLY CALL OFFICE FOR REQUEST FOR TESTIMONY (MINIMUM TWO WEEKS NOTICE), WAGE OR EARNING LOSS, DISABILITY, CONSULTING		

COMMUNICATION			
FINAL REPORT EMAILED TO:		PAC may discuss this case with:	

PAYMENT (CHECK OR MONEY ORDER PAYABLE TO PAC OR DEBIT/CREDIT CARD)				
CARD NUMBER		EXP. DATE	/ /	AMOUNT OWED: $
CARDHOLDER NAME		CARDHOLDER ADDRESS		

FEES MAY VARY DUE TO CASE COMPLEXITIES. WITHDRAWN REQUESTS SUBJECT TO ADMINISTRATIVE FEES. FEE NONREFUNDABLE AFTER VALUATION PERFRMED. ALL REPORTS SENT VIA EMAIL.

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QDRO e-request:
mypac.pensionanalysis.com

NEW JERSEY QDRO REQUEST FORM 2018

FOR DRAFT QDRO OR EQUIVALENT ORDER INCLUDING MCO, COAP, DRO AND ADRO

PARTICIPANT INFORMATION (EMPLOYEE SPOUSE)			
PARTICIPANT NAME			
PARTICIPANT BIRTH DATE		☐ PLAINTIFF	☐ DEFENDANT
PARTICIPANT SOCIAL SECURITY #		EMAIL:	
PARTICIPANT ADDRESS			
ALTERNATE PAYEE INFORMATION (NON-EMPLOYEE SPOUSE)			
ALTERNATE PAYEE NAME			
ALTERNATE PAYEE BIRTH DATE		☐ *PLAINTIFF*	☐ *DEFENDANT*
A.P. SOCIAL SECURITY #		*EMAIL:*	
ALTERNATE PAYEE ADDRESS			

ATTORNEY FOR PARTICIPANT		
PARTICIPANT ATTORNEY		
FIRM NAME		
ADDRESS		
EMAIL		PHONE:
ATTORNEY FOR ALTERNATE PAYEE		
ALTERNATE PAYEE ATTORNEY		
FIRM NAME		
ADDRESS		
EMAIL		*PHONE:*

PERTINENT INFORMATION			
DATE OF MARRIAGE		DATE OF CUTOFF/SEPARATION/COMPLAINT	
COUNTY AND STATE OF JURISDICTION		COURT CASE OR FILE #	
EMPLOYER NAME AND PLAN TO BE QDRO'D			

COMMUNICATION					
The draft should be sent to:	☐ PLAINTIFF	☐ DEFENDANT	PAC may communicate with	☐ PLAINTIFF	☐ DEFENDANT

PAYMENT (CHECK OR MONEY ORDER MADE PAYABLE TO PAC OR DEBIT/CREDIT CARD)				
DRAFT	*$445 FOR FIRST QDRO* *$435 FOR ANY QDRO AFTER ON THE SAME CASE*	*PRE-APPROVAL*	*$70 PER ORDER* *NON-REFUNDABLE*	*AMOUNT TO BE CHARGED: $*
CREDIT CARD NUMBER		EXP. DATE		
CARDHOLDER NAME		CARDHOLDER ADDRESS		

DRAFT QDRO TURNAROUND IS APPROXIMATELY 5-14 BUSINESS DAYS FROM RECEIPT OF FEE/FORM/SETTLEMENT AGREEMENT. PRE-APPROVAL TURNAROUND IS DEPENDENT ON PLAN RESPONSE (SEE PRE-APPROVAL FORM FOR MORE DETAILS). THERE ARE NO ADDITIONAL FEES FOR PLAN DIRECTED REVISIONS. FULL FEE NON REFUNDABLE AFTER QDRO DRAFTED. NO REFUNDS WILL BE PROVIDED FOR CASES THAT REMAIN INACTIVE/WAITLISTED FOR 6 MONTHS. ADMINISTRATIVE FEES WILL BE APPLIED AT THE DISCRETION OF PAC.

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QDRO Pre-Approval Service

Pension Analysis Consultants (PAC®) provides an *optional* QDRO Pre-Approval Service for those who want us to handle the pre-approval process directly with the Plan. With this option, you receive the draft QDRO already pre-approved by the Plan, ready for court certification and then Plan submission and execution. **PAC® Pre-Approval Service is available for most Defined Benefit Plans (pensions) and most Defined Contribution Plans including 401(k) and Savings Plans.**

Federal, Military and Vanguard or Fidelity: Pre-Approval Service is not available for Federal, Military and Vanguard or Fidelity-administered or other Plans who require court-certified documentation prior to pre-approval review. **IRA's**: Many IRA's do not require QDROs**. We encourage you or the client to secure confirmation directly with the investment company that a QDRO or DRO is required before you request our services. Once the fee has been submitted, the Pre-Approval fee is nonrefundable.**

We submit the custom hand-drafted QDRO directly to the QDRO Administrator and follow up to confirm receipt. We review files monthly to check status and send reminders to the Administrator if no response. We review Plan feedback and prepare modified drafts to accommodate Plan-necessitated revisions. With each step, we update the pre-approval spreadsheets and insert copies of all correspondence to and from the Plan in your QDRO file folder. Upon Plan pre-approval, we send you the pre-approved draft QDRO for Court and final Plan submission.
If Plan required revisions are requested, we will incorporate any necessary changes and re-submit for pre-approval, usually at no extra fee. However, if there are substantial changes required which alter the intent of the parties' agreement or are substantially different than that originally requested, additional fees may apply.

PAC® drafts the QDRO in approximately two weeks. The entire pre-approval process is often accomplished smoothly within eight to twelve weeks. In many instances, the process could take months longer depending on the Plan. Plan administrators are not required to review orders within any particular time frame. PAC® is not responsible for lack of Plan response or the slowness of Plan Review Committee scheduling. PAC® is not responsible for internal Plan procedures or the effects of market fluctuation that may occur during the QDRO pre-approval process.

Contact Information: PAC® requests that you or the client contact the Plan to secure the name and contact information of the specific person and their company (often it will be a third-party administrator) responsible for the Plan's QDRO Pre-Approval Review. Giving us correct information regarding the exact name of the Plan and the right person who handles QDRO Review will help the process move faster and minimize pre-approval delays.

QDRO Administrator Name and Title ____
Plan Administrator Firm ____
Plan Address ____
Contact Telephone Number (____) ______-_________ Fax (____) ______-_________ E-Mail ______________________