

QUALIFIED DOMESTIC RELATIONS ORDER REQUEST FORM

FOR DRAFT QDRO OR EQUIVALENT COURT ORDER (MCO, COAP, DRO, ADRO, etc.)

JANUARY 1, 2012

PLAN PARTICIPANT (PENSION HOLDER) Name _____

Address _____

Social Security Number ____/____/____ Date of Birth ____/____/____ Is Participant receiving retirement benefits now? ___Yes___No

The Plan Participant is the Plaintiff (Petitioner) ___ or Defendant (Respondent); ___; Husband ___ or Wife ___

Date of Hire ____/____/____ Date of Marriage ____/____/____ Date of Divorce ____/____/____

Employer _____ Plan _____ Contact _____ Phone (____) ____ - _____

Enter Applicable Marital Cut-off Date for the Divorce State Jurisdiction:

Separation ____/____/____ Divorce ____/____/____

Complaint ____/____/____ Judgment ____/____/____

Filing ____/____/____ Other _____

County & State of Jurisdiction _____

Court _____ Court Case # or File # _____

COUNSEL FOR PLAN PARTICIPANT Name _____

Firm _____

Address _____

Telephone (____) ____ - _____ Fax (____) ____ - _____ E-Mail _____

ALTERNATE PAYEE Name _____

Address _____

Social Security Number ____/____/____ Date of Birth ____/____/____

The Alternate Payee is the Plaintiff (Petitioner) ___ or Defendant (Respondent) ___, Husband ___ or Wife ___

COUNSEL FOR ALTERNATE PAYEE Name _____

Firm _____

Address _____





Telephone (____) ____ - _____ Fax (____) ____ - _____ E-Mail _____

Standard QDRO drafting turnaround is two weeks from receipt of fee, form & details of desired pension distribution (Property Settlement Agreement, Order, Stipulation, Memorandum, etc). We guarantee Plan approval.

IRA Request: Check first with the investment company representing the IRA if QDRO is required. PRO-SE Parties: Additional fees may be required.

QDRO Fee: \$445 Each Additional QDRO: \$435 (2nd, 3rd, 4th, etc. QDRO beyond 1st for additional plans, same case). Additional fees apply for offset calculations where required. Revisions required by the Plan performed *at no extra fee*. Changes by opposing party may require additional fees

QDRO Pre-Approval Fee: \$50

\$ _____ **FEE ENCLOSED.** ___ Check payable to Pension Analysis Consultants ("PAC") or ___  ___  ___  ___ 

Credit Card Number ____/____/____/____ Exp. Date ____/____

Cardholder Name _____ Phone (____) ____ - _____

Cardholder Address _____

City _____ State _____ Zip _____

Fee may occasionally vary depending on the complexity of the case. See our Fee Chart for additional details regarding QDRO services. Use our Pension Valuation Form for pension valuations requests.

Withdrawn QDRO requests subject to withheld fee portion and \$85 administrative fee. Full fee non-refundable.

REQUESTED BY _____ **PERMISSION TO SPEAK WITH OPPOSING ATTORNEY?** ___Yes___No

Joint Request? ___Yes___No *See reverse side for pre-approval information and survivor benefit concerns.*

Send Form, Data, and Fee to:
Pension Analysis Consultants, Inc.
8215 Forest Avenue
P.O. Box 7107
Elkins Park, PA 19027

*Florida Only: 4000 Ponce de Leon Blvd, Ste 470
Coral Gables, FL 33146*



PENSION ANALYSIS CONSULTANTS, INC.

We Value The Future ®

Contact Us at

Phone: (215) 782-9845

(800) 288-3675

Fax: (215) 782-9852

www.pensionanalysis.com

pac1@pensionanalysis.com

Florida Only: pacfl@pensionanalysis.com

NAME OF CASE _____ V. _____

QDRO Pre-Approval Service

Pension Analysis Consultants (PAC) provides an optional QDRO Pre-Approval Service as a way to help streamline the QDRO approval process. **The Pre-Approval Fee is \$50, payable at time of request in addition to the QDRO fee.** Pre-Approval Service is available for most Defined Benefit Plans (pensions) and most Defined Contributions Plans (including 401(k)'s and savings plans). This Pre-Approval Service is not available for Federal or Military Plans. For IRA QDRO Service, please check first with the investment company managing the IRA if a QDRO is required.

This Service includes submitting the draft QDRO to the Plan, following up to ensure receipt, checking review status and preparing modified drafts to accommodate necessary Plan revisions. Upon Plan pre-approval, we send you the pre-approved draft QDRO for Court and final Plan submission. Changes to the pre-approved QDRO not required by the Plan may require additional fees, depending on complexity. Note that the pre-approval process can take two weeks to over six months, or longer. PAC is not responsible for the effects of market fluctuation that may occur during the QDRO pre-approval process.

PAC suggests the Plan representative be contacted for the name of the specific person responsible for the QDRO administration for your exact Plan name. Correct information regarding the right person will minimize pre-approval delays.

QDRO Administrator Name and Title _____
Plan Address _____
Contact phone number (____) _____ - _____ Fax (____) _____ - _____ E-mail _____

Name of QDRO Requestor _____
Date ____/____/____

QDRO Survivor Benefit Concerns

1) If the Alternate Payee dies before commencement, does the benefit revert to the Participant?
2) a. Will the Alternate Payee be the survivor beneficiary on the marital portion or only on his/her own portion? _____ _____
b. If the Alternate Payee is the survivor beneficiary on the marital portion, is the cost shared by the parties? _____

Send Form, Data, and Fee to:
Pension Analysis Consultants, Inc.
8215 Forest Avenue
P.O. Box 7107
Elkins Park, PA 19027

*Florida Only: 4000 Ponce de Leon Blvd, Ste 470
Coral Gables, FL 33146*



PENSION ANALYSIS CONSULTANTS, INC.

Contact us at:
Phone: (215) 782-9845
(800) 288-3675
Fax: (215) 782-9852
www.pensionanalysis.com
pac1@pensionanalysis.com

Florida Only: pacfl@pensionanalysis.com