



PENSION ANALYSIS CONSULTANTS, INC.

We Value Your Future®

www.pensionanalysis.com

Contact Us
 Phone: (215) 782-9845
 (800) 288-3675
 Fax: (215) 782-9852
QDRO e-request:
mypac.pensionanalysis.com

VALUATION REQUEST FORM 2020

PARTICIPANT INFORMATION (EMPLOYEE SPOUSE)			
PARTICIPANT NAME		<input type="checkbox"/> FEMALE	<input type="checkbox"/> MALE
PARTICIPANT BIRTH DATE	DATE OF MARRIAGE		
HIRE DATE	MARITAL CUTOFF/SEPARATION/COMPLAINT		
PLAN ENTRY DATE	DIVORCE COUNTY		
EMPLOYER	PLAN NAME		
CURRENT EMPLOYMENT STATUS	<input type="checkbox"/> ACTIVE AT PLAN <input type="checkbox"/> TERMINATED / / <input type="checkbox"/> RETIRED / /		
NON-EMPLOYEE SPOUSE INFORMATION			
NON-EMPLOYEE SPOUSE NAME	BIRTH DATE / /	<input type="checkbox"/> FEMALE	<input type="checkbox"/> MALE
REQUESTING PARTY			
ATTORNEY	REPRESENTS <input type="checkbox"/> EMPLOYEE <input type="checkbox"/> SPOUSE		
FIRM NAME			
ADDRESS			
EMAIL	PHONE:		
SERVICE REQUESTED (CALL PAC FOR RUSH SERVICE AVAILABILITY) - DOCUMENTATION TO PROVIDE - FEE			
STANDARD SERVICE 10-14 BUSINESS DAYS <input type="checkbox"/>	REGULAR RUSH (4-7 DAYS) \$75 <input type="checkbox"/>	PRIORITY RUSH (24-48 HOURS) \$125 <input type="checkbox"/>	
INTEREST RATE TO BE USED <input type="checkbox"/> IRC OR <input type="checkbox"/> PBGC <i>If you do not indicate interest rate to be used, we will utilize IRC. Note PBGC gives a higher value.</i>			
<input type="checkbox"/> DEFINED BENEFIT PLAN VALUATION	STATEMENT OF ACCRUED BENEFIT PAYABLE AT NORMAL RETIREMENT	\$250	
<input type="checkbox"/> MILITARY PENSION (ACTIVE) /RESERVES	RANK {RESERVES-POINTS HISTORY}	\$250	
<input type="checkbox"/> FEDERAL PENSION	HIGH THREE SALARY AND CONTRIBUTIONS	\$250	
<input type="checkbox"/> SOCIAL SECURITY OFFSET	WAGE HISTORY OF EMPLOYEE/NONEMPLOYEE	\$340	
<input type="checkbox"/> *JOINT AND SURVIVOR	OPTION TAKEN AT RETIREMENT	\$120*	
<input type="checkbox"/> *ADDITIONAL INTEREST RATE OR CUTOFF DATE		\$125 PER ADDITION*	
<input type="checkbox"/> *VERBAL CRITIQUE OF OPPOSING VALUATION *WRITTEN CRITIQUE		\$100* \$300/HOUR WITH RETAINER	
<input type="checkbox"/> DEFINED CONTRIBUTION VALUATION (401(K), 403(B), TIAA-CREF, TSP, STOCK OWNERSHIP • STARTED BEFORE DATE OF MARRIAGE • STARTED AFTER DATE OF MARRIAGE	Started Before Marriage Date: QUARTERLY STATEMENTS FROM MARRIAGE TO PRESENT DATE Started After Marriage Date: QUARTERLY STATEMENTS FROM DATE OF FILING OF THE CUTOFF DATE TO PRESENT DATE	BEFORE MARRIAGE: \$500 AFTER MARRIAGE: \$300 HOURLY FEES MAY APPLY IN COMPLEX CASES	
*IN ADDITION TO THE STANDARD REPORT, IF NEEDED INDIVIDUALLY A FULL FEE WILL APPLY CALL OFFICE FOR REQUEST FOR TESTIMONY, WAGE OR EARNING LOSS, DISABILITY OR CONSULTING. Two week minimum notice for testimony.			
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, EXPIRATION DATE & SECURITY CODE	AMOUNT TO BE CHARGED:		\$
CARDHOLDER NAME AND CARD ADDRESS			

Send or Scan Form, Data and Fee
Pension Analysis Consultants, Inc.
8215 Forest Avenue, P.O. Box 7107
Elkins Park, PA 19027
pac1@pensionanalysis.com
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QDRO REQUEST FORM 2020

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

PARTICIPANT INFORMATION (EMPLOYEE SPOUSE)				
PARTICIPANT NAME				
PARTICIPANT BIRTH DATE		<input type="checkbox"/> PLAINTIFF	<input type="checkbox"/> DEFENDANT	
PARTICIPANT SOCIAL SECURITY #		EMAIL:		
PARTICIPANT ADDRESS				
PARTICIPANT ENTRY DATE:	(IF EXACT DATE UNKNOWN) PLAN ENTRY STARTED BEFORE MARRIAGE <input type="checkbox"/> OR DURING <input type="checkbox"/>			
ALTERNATE PAYEE INFORMATION (NON-EMPLOYEE SPOUSE)				
ALTERNATE PAYEE NAME				
ALTERNATE PAYEE BIRTH DATE		<input type="checkbox"/> PLAINTIFF	<input type="checkbox"/> 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:	<input type="checkbox"/> PLAINTIFF	<input type="checkbox"/> DEFENDANT	PAC may communicate with	<input type="checkbox"/> PLAINTIFF <input type="checkbox"/> DEFENDANT
PAYMENT (CHECK OR MONEY ORDER MADE PAYABLE TO PAC OR DEBIT/CREDIT CARD)				
FEES	\$445 FOR FIRST QDRO \$435 FOR ANY QDRO AFTER ON THE SAME CASE	PRE-APPROVAL	\$70 PER ORDER NON-REFUNDABLE	AMOUNT TO BE CHARGED: \$
CARD NUMBER, EXP DATE & SECURITY #				
CARDHOLDER NAME BILLING ADDRESS				

DRAFT QDRO TURNAROUND IS APPROXIMATELY 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: As 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. There is no refund after we have drafted the QDRO, but then deemed not needed by the Plan.

Procedure: 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.

Turnaround: 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 _____