

Send or Scan Form, Data and Fee
Pension Analysis Consultants, Inc.
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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

PRO SE 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				
DATE STARTED IN PLAN	(IF EXACT DATE UNKNOWN) EMPLOYMENT 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				
PERTINENT INFORMATION				
DATE OF MARRIAGE		DATE OF CUTOFF/SEPARATION/COMPLAINT		
COUNTY AND STATE OF JURISDICTION	COURT CASE OR FILE #			
EMPLOYER NAME AND EXACT PLAN NAME				
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)				
DRAFT	\$625 FOR FIRST QDRO \$615 FOR ANY QDRO AFTER ON THE SAME CASE	OPTIONAL PRE-APPROVAL	\$70 PER ORDER NON-REFUNDABLE	AMOUNT TO BE CHARGED: \$
CARD NUMBER, EXPIRATION DATE & SECURITY CODE				
CARDHOLDER NAME AND 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/WAILED 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 strongly encourage you to secure confirmation directly with the investment company that a QDRO or DRO is required before you request our services. Once the QDRO has been drafted, drafting fees are non-refundable.

Procedure: We submit the custom draft 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 _____

Plan Administrator Firm _____

Plan Address _____

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

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 SHEET 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.