

**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](http://www.pensionanalysis.com)

**Contact Us**

**Phone:** (215) 782-9845

(800) 288-3675

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(888) 782-9852

**QDRO e-request:**

[mypac.pensionanalysis.com](mailto:mypac.pensionanalysis.com)

## PRO SE QDRO REQUEST FORM 2021

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

PARTICIPANT INFORMATION (PLANHOLDER EMPLOYEE OF PLAN TO BE QDRO'D)			
PARTICIPANT EMPLOYEE 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, EMPLOYMENT STARTED BEFORE MARRIAGE <input type="checkbox"/> OR DURING <input type="checkbox"/>		
ALTERNATE PAYEE INFORMATION (NON-EMPLOYEE SPOUSE)			
ALTERNATE PAYEE (AP) NAME			
AP BIRTH DATE		<input type="checkbox"/> PLAINTIFF	<input type="checkbox"/> DEFENDANT
AP SOCIAL SECURITY #	EMAIL:		
AP ADDRESS			
PERTINENT INFORMATION			
DATE OF MARRIAGE		MARITAL CUTOFF DATE: SEPARATION, COMPLAINT OR FILING	
COUNTY AND STATE OF JURISDICTION		COURT CASE. OR FILE #	
EMPLOYER NAME AND EXACT PLAN NAME			
If Plan is IRA:	Many IRA's do not require QDROs. We encourage you to secure confirmation directly with the investment company that a QDRO is required before you request our drafting services. There is no refund after we have drafted the QDRO, but then deemed not needed by the Plan.		
FEE PAYMENT AT TIME OF REQUEST BY CHECK OR MONEY ORDER MADE PAYABLE TO PAC OR BY CREDIT CARD			
	<b>\$625.00 FOR EACH QDRO REQUESTED.</b> Plan-necessitated revisions are included at no extra fee.  <b>FOR OPTIONAL PRE-APPROVAL SERVICE: Add \$70.</b> See details and required contact information on the QDRO Preapproval Form.	CHECK ENCLOSED \$_____ CREDIT CARD AUTHORIZATION \ \$_____	
CARD NUMBER, EXPIRATION DATE & SECURITY CODE			
CARDHOLDER NAME AND ADDRESS			

Divorce Mediator Name & Firm \_\_\_\_\_  
 Email \_\_\_\_\_

QDRO Requestor Name & Email \_\_\_\_\_

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 CONTACT INFORMATION**

Pension Analysis Consultants (PAC®) will send the draft QDRO directly to the plan for pre-approval review. Getting the draft pre-approved is recommended to avoid repeat court certification if original QDRO is denied for any reason.

Pre-Approval Service is available for most Defined Benefit Plans (pensions) and most Defined Contribution Plans including 401(k) and Savings Plans. It is not available for Federal, Military and Fidelity-administered or other Plans who require court-certified documentation prior to pre-approval review.

**Pre-Approval Process:** We submit your draft QDRO directly to the QDRO Administrator you have indicated. We follow up to confirm receipt. We review files monthly to check status. We send reminders to the QDRO Administrator. We review Plan feedback. We 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.

**Revisions:** 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.

**Required 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. Correct information of exact name of the Plan and the right person to contact for pre-approval QDRO Review will help move the process faster and minimize pre-approval delays.

**Name of Plan Participant (Plan holder Employee)**

\_\_\_\_\_  
Company name \_\_\_\_\_  
Exact Name of Plan \_\_\_\_\_

**QDRO Plan Administrator:**

Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Address \_\_\_\_\_  
Phone (\_\_\_\_) \_\_\_\_-\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_-\_\_\_\_ E-Mail \_\_\_\_\_

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