Send or Scan Form, Data and Fee
Pension Analysis Consultants, Inc.
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PAC
PENSION ANALYSIS CONSULTANTS, INC.
We Value Your Future ®
www.pensionanalysis.com

Contact Us
Phone: (215) 782-9845
(800) 288-3675
Fax: (215) 782-9852
(888) 782-9852
QDRO e-request:
mypac.pensionanalysis.com

VALUATION REQUEST FORM 2021

REQUESTED BY: ______________________________

REQUESTOR EMAIL: ______________________ PAC MAY DISCUSS WITH: ______________________________

PARTICIPANT INFORMATION (PLANHOLDER; EMPLOYEE OF PLAN TO BE VALUED)			
PLANHOLDER NAME			☐ FEMALE ☐ MALE
BIRTH DATE		DATE OF MARRIAGE	
HIRE DATE		DATE OF MARITAL SEPARATION, COMPLAINT	
PLAN ENTRY DATE		DIVORCE COUNTY	
EMPLOYER		PLAN NAME	
STATUS AT PLAN	☐ ACTIVE AT PLAN	☐ TERMINATED / /	☐ RETIRED / /

ALTERNATE PAYEE INFORMATION (NON-EMPLOYEE SPOUSE)			
NON-EMPLOYEE SPOUSE		BIRTH DATE	☐ FEMALE ☐ MALE

REQUESTING PARTY			
ATTORNEY or MEDIATOR			
FIRM			
ADDRESS			
EMAIL		PHONE	

SERVICE REQUESTED. CALL FIRST FOR RUSH SERVICE AVAILABILITY	DOCUMENTATION NEEDED	FEE DUE AT REQUEST
STANDARD SERVICE 10-14 BUSINESS DAYS ☐	REGULAR RUSH (4-7 DAYS) add $75 ☐	PRIORITY RUSH (24-48 HOURS) add $125 ☐
INTEREST RATE TO BE USED: ☐ *IRC OR* ☐ *PBGC. (PBGC GIVES A HIGHER VALUE).* IF NO RATE IS CHOSEN BY THE REQUESTOR, IRC RATEWILL BE USED.		
☐ DEFINED BENEFIT PLAN VALUATION	PROVIDE A STATEMENT OF ACCRUED BENEFIT PAYABLE AT NORMAL RETIREMENT	$250
☐ MILITARY PENSION (ACTIVE)	PROVIDE RANK & RESERVES-POINTS HISTORY	$250
☐ FEDERAL PENSION	PROVIDE HIGH 3 SALARY AND CONTRIBUTIONS	$250
☐ SOCIAL SECURITY OFFSET	PROVIDE WAGE HISTORY OF EMPLOYEE	$340
☐ *JOINT AND SURVIVOR	PROVIDE OPTION TAKEN AT RETIREMENT	$120*
☐ *ADDITIONAL INTEREST RATE OR CUTOFF DATE		$125 PER ADDITION*
☐ CRITIQUE OF OPPOSING VALUATION -- VERBAL -- WRITTEN	SERVICE DOCUMENTATION & OPPOSING REPORT	$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 ____	<u>STARTED BEFORE MARRIAGE</u>: PROVIDE QUARTERLY STATEMENTS FROM MARRIAGE TO PRESENT DATE <u>STARTED AFTER MARRIAGE</u>: PROVIDE QUARTERLY STATEMENTS FROM MARITAL CUT-OFF DATE TO PRESENT DATE	BEFORE MARRIAGE: $500 HOURLY FEES MAY APPLY IN COMPLEX CASES AFTER MARRIAGE: $300

*IN ADDITION TO THE STANDARD REPORT, IF NEEDED INDIVIDUALLY A FULL FEE WILL APPLY. REFUNDS FOR ANY REASON ARE GIVEN AT THE DISCRETION OF PAC, LESS ADMINISTRATIVE AND HANDLING FEE. CALL OFFICE FOR TESTIMONY, WAGE OR EARNING LOSS, DIABLITY OR CONSULTING. TWO WEEK MINIMUM NOTICE FOR TESTIMONY

PAYMENT: PROVIDE CHECK OR MONEY ORDER PAYABLE TO PAC, or CREDIT CARD INF0RMATION AND CARDHOLDER NAME AND CARDHOLDER ADDRESS

CARD NUMBER, EXPIRATION DATE & SECURITY CODE		CHECK ENCLOSED $_____ CARD AUTHORIZED $_____
CARDHOLDER NAME AND ADDRESS ON THE CARD		

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QDRO REQUEST FORM 2021

PARTICIPANT INFORMATION (EMPLOYEE SPOUSE)			
PARTICIPANT NAME			
PARTICIPANT BIRTH DATE		☐ PLAINTIFF	☐ DEFENDANT
PARTICIPANT SOCIAL SECURITY #		EMAIL:	
PARTICIPANT ADDRESS			
PARTICIPANT ENTRY DATE:	/ /	If exact date unknown: Plan entry started before marriage ☐ or during marriage ☐	
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 PLAN TO BE QDRO'D IRA Note:	____________ ____________ Contact IRA to confirm a QDRO is required before request with PAC. No refund issued if draft QDRO returned, deemed not needed.		

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)				
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				

QDRO Pre-Approval Service Information

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. Without this option, you will sent a draft QDRO as is. **PAC® Pre-Approval Service is available for most Defined Benefit Plans (pensions) and most Defined Contribution Plans including 401(k) and Savings Plans.** With this pre-approval service, you only need court certification once.

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, so we urge 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: Please complete the information below. 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.

FOR QDRO PARTICIPANT NAME ____

PRE-APPROVAL CONTACT PERSON INFORMATION:
QDRO Administrator Name and Title____
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 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.