



NJ VALUATION REQUEST FORM 2021 REQUESTED BY _____

PARTICIPANT INFORMATION (PLANHOLDER; EMPLOYEE OF PLAN TO BE VALUED)		
PLANHOLDER & EMAIL		<input type="checkbox"/> FEMALE <input type="checkbox"/> MALE
BIRTH DATE	DATE OF MARRIAGE	
HIRE DATE	DATE OF MARITAL COMPLAINT	
PLAN ENTRY DATE	DIVORCE COUNTY	
EMPLOYER	PLAN NAME	
STATUS AT PLAN	<input type="checkbox"/> ACTIVE AT PLAN <input type="checkbox"/> TERMINATED / / <input type="checkbox"/> RETIRED / /	
ALTERNATE PAYEE INFORMATION (NON-EMPLOYEE SPOUSE)		
NON-EMPLOYEE SPOUSE & EMAIL	BIRTH DATE	<input type="checkbox"/> FEMALE <input type="checkbox"/> MALE
REQUESTING PARTY		
ATTORNEY or MEDIATOR		PERSONAL EMAIL OR CELL
FIRM		
ADDRESS		
EMAIL		PHONE
SERVICE REQUESTED. CALL FIRST FOR RUSH SERVICE AVAILABILITY	DOCUMENTATION NEEDED	FEE DUE AT REQUEST
STANDARD SERVICE 10-14 BUSINESS DAYS <input type="checkbox"/>	REGULAR RUSH (4-7 DAYS) add'l \$75 <input type="checkbox"/>	PRIORITY RUSH (24-48 HRS) add'l \$125 <input type="checkbox"/>
INTEREST RATE TO BE USED: <input type="checkbox"/> IRC OR <input type="checkbox"/> PBGC. (PBGC GIVES A HIGHER VALUE). IF NO RATE IS CHOSEN BY THE REQUESTOR, IRC RATE WILL BE USED.		
<input type="checkbox"/> DEFINED BENEFIT PLAN VALUATION	PROVIDE A STATEMENT OF ACCRUED BENEFIT PAYABLE AT NORMAL RETIREMENT	\$220
<input type="checkbox"/> MILITARY PENSION (ACTIVE)	PROVIDE RANK & RESERVES-POINTS HISTORY	\$220
<input type="checkbox"/> FEDERAL PENSION	PROVIDE HIGH 3 SALARY AND CONTRIBUTIONS	\$220
<input type="checkbox"/> SOCIAL SECURITY OFFSET	PROVIDE WAGE HISTORY OF EMPLOYEE	\$340
<input type="checkbox"/> *JOINT AND SURVIVOR	PROVIDE OPTION TAKEN AT RETIREMENT	\$120*
<input type="checkbox"/> *ADDITIONAL INTEREST RATE OR CUTOFF DATE		\$125 PER ADDITION*
<input type="checkbox"/> CRITIQUE OF OPPOSING VALUATION -- VERBAL -- WRITTEN	SERVICE DOCUMENTATION & OPPOSING REPORT	\$100* \$300/HOUR WITH RETAINER
<input type="checkbox"/> DEFINED CONTRIBUTION VALUATION (401(K), 403(B), TIAA-CREF, TSP, STOCK OWNERSHIP STARTED BEFORE THE MARRIAGE _____ STARTED AFTER THE MARRIAGE _____	STARTED BEFORE MARRIAGE: PROVIDE QUARTERLY STATEMENTS FROM MARRIAGE TO PRESENT DATE STARTED AFTER MARRIAGE: 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.		

PAYMENT: PROVIDE CHECK OR MONEY ORDER PAYABLE TO PAC, or CREDIT CARD INFORMATION AND CARDHOLDER NAME AND CARDHOLDER ADDRESS		
CARD NUMBER, EXPIRATION DATE & SECURITY CODE		CHECK ENCLOSED \$ _____ CARD AUTHORIZED \$ _____
CARDHOLDER NAME & ADDRESS		



QDRO REQUEST FORM 2021

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 marriage <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 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:	<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				

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 send 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 _____