

The Griffin Firm

A Full Service QDRO Firm

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QDRO INFORMATION SHEET

1. Plan Participant (Employee)

- a. Name: _____
- b. SS# (Must have to complete) _____
- c. DOB: _____
- d. Current Address: _____
- e. Attorney for Participant: _____
- f. Date of beginning of Plan participation _____
- g. Employee No. (if applicable) _____
- h. Date of termination of Plan participation (if applicable) _____
- i. Is the participant currently receiving retirement benefits from this Plan: _____
- j. Was the employee hourly or salaried or both: _____
- k. Employment status of participant (active, laid-off, terminated or retired): _____

2. Alternate Payee (Non-employee/spouse)

- a. Name: _____
- b. SS# _____
- c. DOB: _____
- d. Current Address: _____
- e. Attorney for Alternate Payee: _____
- f. Alternate Payee Phone Number: _____

3. Facts

- a. Date of Marriage: _____
- b. Date of Divorce or Separation: _____
- c. Date of Division if different from Date of Divorce or Separation (must be in Decree): _____
- d. How is the Plan to be divided according to the Decree:
To Participant: _____
To Alternate Payee: _____
- e. Has the Court signed a previous QDRO in the case on this Plan: _____

4. The Plan

** It is necessary to inquire about all retirement programs that the employee participated in. Use a different info sheet for each retirement plan, even if it is with the same company.

- a. Plan Sponsor (Employer): _____
- b. EXACT name of the Plan: _____
- c. Name of the Plan Administrator or HR contact: _____
- d. Address of Plan Administrator: _____

- e. Phone number of Plan Administrator or HR contact: _____

With this form please provide the following:

1. A check for \$300 per QDRO made payable to *The Griffin Firm*
2. Names, addresses, phone numbers and bar numbers of the attorneys in the case that will be reviewing and approving the QDRO. If you prefer you may send a copy of the signature page of the Divorce Decree.
3. A copy of that portion of the Divorce Decree that divides the retirement plan along with a copy of the first page of the Divorce Decree.
4. If the plan is a military retirement involving someone in the reserves, we will also need a copy of the yearly "points" statement.

Note: The fee includes the drafting of the QDRO and submission to the Plan Administrator for approval after the QDRO has been entered by the Court. It is the obligation of the attorney representing the party to enter the QDRO with the Court and send us a certified copy of the QDRO. Occasionally, certain plan administrators require a certified copy of the Decree along with the certified copy of the QDRO. In these instances we will advise you in advance that a certified copy of the decree is needed with the QDRO. We guarantee that all QDRO's will be approved by the Plan Administrator. If, for any reason, the QDRO requires changes or revisions, we will make the change or revision at no extra cost. However, the entry of the revised plan with the Court is the responsibility of the attorney and any fee by the court (such as filing fees), are to be borne by the client. Our fee does NOT include any fee charged by the plan administrator. Such fees are to be borne by the parties and are usually taken directly out of the proceeds of the plan itself. It is the responsibility of the attorneys and the parties to review the QDRO and ensure that it complies with the intent of the parties and/or Court prior to submission to the Court.