



QDRO Pros, Inc. DATA SHEET
CalPERS

Plan Information

What is Member's name?

First name _____ Middle name _____ Last name _____

Plan Information:

CalPERS
Community Property Unit
PO Box 2056
Sacramento, CA 95812
Telephone: (916) 795-3551 Fax: (916) 795-3389

Employment information

Name of Member's CalPERS employer _____

Date of Hire: Month _____ Day _____ Year _____

QUESTIONS FOR RETIRED MEMBERS ONLY:

If the Member is retired, the following information is **REQUIRED**. If you do not know the answers to the questions below, please contact CalPERS for assistance. A QDRO cannot be completed without the following information:

Date of Retirement: Month _____ Day _____ Year _____

Benefit option selected at the time of retirement:

- Life only annuity (no beneficiary)
- Joint and survivor annuity for Former Spouse (Nonmember)
- Joint and survivor annuity with someone else

Name of Member's beneficiary, if any: _____

QUESTIONS FOR MEMBERS WHO HAVE NOT YET RETIRED

Which method of division do the parties agree to use?

- Separation of Account (segregation method) **OR**
- Division of Community Property Interest at the Time Benefits Become Payable to Member (time-rule or shared method)

As a courtesy, we have included a chart outlining some of the differences between the methods. This list is not complete or exhaustive. If you need more information please contact CalPERS



and/or your attorneys to determine which method would best suit your needs, obligations, and desires.

What Benefit should Nonmember Spouse receive during their lifetime?

- Time Rule
- Flat percentage _____%
- Flat dollar amount \$_____

If Shared Approach

Is Member required to elect a Survivor benefit for Nonmember Former Spouse?

- Yes,
 - 100% Survivor benefit
 - Pro rata share based on community property interest
 - Other percent _____%
- No

If Yes, who pays for the Survivor benefit?

- Shared pro rata to community property interest
- Member Only
- Nonmember Spouse Only

If Member dies before retirement is Nonmember Spouse entitled to Pre-retirement survivor annuity?

- Yes
- No

If Nonmember Spouse dies first, the Nonmember Spouse's Interest shall be paid as follows:

- Revert to Member
- Minor children of the marriage
- Estate of the Nonmember Spouse

If Segregated Approach

Upon the death of the Nonmember Spouse, Nonmember Spouse's Interest shall be paid as follows:

- Life only annuity – benefit ends on Nonmember Spouse's death
- Minor children of the marriage
- Estate of the Nonmember Spouse



General Information

Is Nonmember Spouse entitled to Early Retirement Enhancements?

- Yes
- No

Is Nonmember Spouse entitled to Cost of Living Adjustments (COLAs) on their share?

- Yes
- No

Has a Joinder been filed? Yes No

If Yes, please send a copy

Have any prior QDROs been filed on this plan? Yes **or** No

If yes, please mail copies of prior QDROs to QDRO Pros, Inc.

Are there any special Arrangements between you and your former spouse that are not included in the MSA, Judgment for Dissolution, or in the questions above?

If yes, please describe special arrangements:

