



QDRO Pros, Inc. DATA SHEET DEFINED BENEFIT PLAN

Plan Information

What is participant's name?

First name _____ Middle name _____ Last name _____

What is the full name of the Plan? _____

Plan Administrator's name _____

Street Address _____

City _____

State _____ Zipcode _____

Office phone ____ - ____ Fax ____ - ____

Email _____

Plan address to which QDROs should be mailed, if different:

QDRO Administrator's Name _____

Street Address _____

City _____

State _____ Zipcode _____

Office phone ____ - ____ Fax ____ - ____

Email _____

Employment Information

Participant's Employer's Name for this Plan _____

Date of Hire: Month _____ Day _____ Year _____



Is Participant Retired and in Pay Status? Yes No

If Yes:

What was the date of retirement? Month_____ Day_____ Year_____

What form of benefit did participant select at Retirement?

- Joint and Survivor annuity with former spouse **or**
- Joint and Survivor annuity with someone else **or**
- Single Life annuity

Former Spouse's Benefits

What form of benefit is Former Spouse to receive?

Share **or** Segregated (See attached chart for assistance) (*QDRO Pros will default to Segregated.*)

How are former spouse's share of benefits to be determined?

- time rule **or** fixed % _____ **or** fixed \$ _____

If based on time rule or fixed % what date should it be based on?

- Date of separation **or** Date of dissolution **or**
- Other _____

If Shared, does Former Spouse received a survivor benefit?

- Yes No

If Yes, how much of the Survivor Benefit does Former Spouse receive?

- 100%
- Pro rata community property share
- Other Percent _____%

If Yes, who pays for the survivor benefit?

- Shared pro rata based on community property
- Participant only
- Former Spouse only

If Yes, is Former Spouse entitled to Qualified Pre-retirement Survivor Benefit?
(*QDRO Pros will default to Yes*)

If Yes, what happens to benefit if Former Spouse predeceases Participant?

- Reverts to Participant
- Minor children of the marriage



Estate of Former Spouse

Is Former Spouse entitled to Early Retirement Enhancements? (*QDRO Pros will default to Yes*)

Yes No

Is Former Spouse entitled to Cost of Living Adjustments? (*QDRO Pros will default to Yes*)

Yes No

General Information

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

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

If there are any special Arrangements between you and your former spouse that are not included in the MSA or Judgment for Dissolution, please describe the special arrangements below:

