



QDRO Pros, Inc. DATA SHEET

**PRIVATE or PUBLIC EMPLOYER DEFINED CONTRIBUTION PLAN,
THRIFT SAVINGS PLAN, 401(k), 403(b), 457 (Deferred Compensation), IRA**

Note: If you are dividing an IRA, please contact the IRA Administrator to determine whether a QDRO is necessary or appropriate as QDROs are often not accepted for IRA assets.

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 or Plan Membership: Month _____ Day ____ Year _____

Division of Plan Information

Date account is to be divided:

- Date of retirement
- Date of separation
- Date of dissolution
- Other: Month _____ Day ____ Year _____



Method of Division: \$_____ or %_____

If Percentage division, is there any separate property in the plan as of date of marriage?

Yes No

If Yes, will the Plan calculate the community property? **(Must check with Plan)**

If Yes, what is the earliest date that Plan has financial data? __/__/____?

If the date of earliest Plan financial data is after date of marriage, you will need to do a calculation to determine a flat dollar amount or percentage as of a date after the earliest plan financial information.

Is former spouse's share adjusted for gains and losses after date of division?

Yes **or** No (QDRO Pros will default to Yes)

General Information

Are there any loans outstanding? Yes **or** No

If yes, who is responsible for payment of loans?

- Participant
- Former Spouse
- Shared

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

