



QDRO Pros, Inc. DATA SHEET
CalSTRS

Plan Information

What is member's name?

First name _____ Middle name _____ Last name _____

Plan Contact Information

CalSTRS

Attn: Legal Services, MS-03, PO Box 15275, Sacramento, CA 95851
Phone: (800) 228-5453 Fax: (916) 414-1722

Employment information

Date of Hire or Plan Participation, if later: Month _____ Day _____ Year _____

Name of Employer: _____

QUESTIONS FOR RETIRED MEMBERS ONLY:

If the Member is retired, the following information is **REQUIRED** in order to draft the QDRO. If you do not know the answers to the questions below, please contact CalSTRS for assistance.

Date of Retirement: Month _____ Day _____ Year _____

Benefit option selected at the time of retirement: _____

(Ex. 100% Beneficiary, 75% Beneficiary, 50% Beneficiary, Compound Option)

Name of option beneficiary: _____

Has Member remarried? Yes No

If yes, is Member's **current** spouse on file as the option beneficiary? Yes No

If Nonmember Spouse predeceases member, nonmember's benefits shall:

- Be payable to nonmember's designated beneficiary **OR**
- Return to member

QUESTIONS FOR MEMBERS WHO ARE NOT RETIRED or RECEIVING BENEFITS

If not addressed in your MSA, which method of division do the parties agree to use?

(See next page for summary of methods)

- Segregation method **OR**
- Time-rule formula **OR**
- A Flat Percentage of Member's retirement allowance equal to _____%

If a flat percentage is selected, is that percentage awarded under:

- the segregation method **OR** the time rule formula

If the TIME RULE was selected above, please answer the following:

If Nonmember Spouse predeceases member, nonmember's benefits shall:

- Be payable to nonmember's designated beneficiary for as long as member lives



OR Be returned to member

Below we have provided a general overview of each method of division. If your MSA does not address this issue, please contact CalSTRS and your attorneys to determine which method would best suit your needs, obligations, and desires. QDRO Pros, Inc., as a neutral party, cannot advise you on which method of division to use.

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.

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

JOINDER

CalSTRS requires that a joinder be filed with the court that makes CalSTRS a party to the divorce action. CalSTRS cannot enforce a court order to divide a Member's benefits unless they are made a party to the divorce action via a joinder. Please find out from your attorneys if a joinder has already been filed. If the plan has not been joined, QDRO Pros, Inc. can prepare and serve all joinder documents for you for an additional fee of \$300.00.

- I would like QDRO Pros to prepare the joinder and I have enclosed a check in the amount of \$_____ for this purpose.
- A joinder was previously completed and was filed on ____/____/_____. Please send QDRO Pros, Inc. a copy of the filed joinder.



| | SEGREGATION METHOD | TIME RULE FORMULA |
|---|--|---|
| Availability | Only available if Member has not yet retired or begun to receive a benefit of any kind. | Available if Member is active or retired. |
| Award Calculation | The amount awarded to Nonmember Spouse is typically 50% of Member's service credit years, contributions and interest earned from the date of marriage to date of separation. Nonmember Spouse can then apply for a lump-sum distribution at any time, or at age 55 or older receive a lifetime monthly benefit. Nonmember Spouse's monthly benefit is calculated using Member's salary on date of separation, Nonmember Spouse's age at the date of retirement and the service credit awarded to Nonmember Spouse. | CalSTRS calculates the service credit earned by Member from date of marriage to date of separation and determines what ratio of Member's monthly benefit is community property and what percentage of Member's benefit is payable to Nonmember Spouse each month. Nonmember Spouse's benefit is calculated using Member's salary at the time of retirement. |
| Restrictions | Member's Defined Benefit Supplement account or Cash Balance Benefit account can only be divided using the segregation formula. This is because only contributions and interest are earned but not service credit. | None |
| Availability of Nonmember Spouse's Share | Immediately available – Nonmember Spouse receives a separate account or a monthly benefit when Nonmember Spouse is age 55. | Not available until Member retires – Nonmember Spouse does not receive a separate account. |
| Impact of Service Credit & Contributions | Service credit is removed from the member's account. | Service credit is not removed from the member's account. |

