



(760) 334-8560

[www.QDROPros.com](http://www.QDROPros.com)

6165 Greenwich Dr., Suite 180  
San Diego, California 92122

## QDRO Pros, APC. DATA SHEET CalPERS

### Plan Information

What is Member's name (Employee)?

First name \_\_\_\_\_ Middle name \_\_\_\_\_ Last name \_\_\_\_\_

Plan Information:

CalPERS  
Community Property Unit  
PO Box 2056  
Sacramento, CA 95812  
Telephone: (888) 225-7377 Fax: (916) 795-3389

### Employment information

Member's CalPERS Employer \_\_\_\_\_

Date of Hire: Month \_\_\_\_\_ Day \_\_\_\_\_ Year \_\_\_\_\_

Member's CalPERS ID \_\_\_\_\_

### **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 on the next page 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.**



	<b>SEGREGATION METHOD</b>	<b>SHARED METHOD</b>
<b>Basic method information</b>	Allows the community property interest in a member's pension to be separated into 2 accounts – one in the name of the member and one in the name of the nonmember spouse.	There will only be one account (in member's name) and nonmember spouse receives a lifetime benefit equal to his or her community property interest.
<b>Nonmember Spouse's Commencement</b>	Possible when both parties reach the minimum retirement age	Nonmember spouse's interest can only be paid by CalPERS at the time that benefits become payable (member's retirement date or death).
<b>Nonmember Spouse's Payment Options</b>	Monthly allowance, or withdrawal by direct refund or rollover	Monthly allowance
<b>Optional Settlement at Retirement</b>	No restrictions on member's election. Nonmember spouse can elect an option for his/her account and name beneficiaries.	Generally, member must elect optional settlement 4 and name nonmember spouse as beneficiary to the extent of his/her community property interest
<b>Death Benefits</b>	Member's death does not affect Nonmember's spouse's separate account.	Nonmember spouse receives his/her community property interest in any lump sum or other death benefits payable by the Plan.

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
- Shared equally
- 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

**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: \_\_\_\_\_

**General Information**

Is Nonmember Spouse entitled to Early Retirement Enhancements?

- Yes, community property
- No

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

- Yes, community property
- No

Has a Joinder been filed?  Yes  No

If Yes, please send a copy, if No, would you like QDRO Pros to file one? It is not required by CalPERS.

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:

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