

QUALIFIED DOMESTIC RELATIONS ORDER CHECKLIST

1. Participant: (Employee)

Name: _____

Mailing Address: _____

Phone Number: _____

Date of Birth: _____

Social Security Number: _____

Email: _____

2. Alternate Payee: (Spouse or Former Spouse)

Name: _____

Mailing Address: _____

Phone Number: _____

Date of Birth: _____

Social Security Number: _____

Email: _____

3. Date of Marriage: _____

4. Date of Divorce: _____

5. Plan(s) Name: _____

Plan Administrator: _____

Plan Administrator's phone number: _____

6. Date Participant Joined Plan(s): _____

7. **Percent or dollar Amount of Participant's benefits to be paid by the plan to the Alternate Payee and Valuation Date?**

Dollar Amount : \$ _____ or Percent: _____ %

If a percent is chosen, chose option 1 or 2

_____ Option #1 – Date Marriage Ended

_____ Option #2 – Specific Date _____

8. **Should the Alternate Payee receive gains/losses on his/her share of the benefits from the Date of Division to the Date of Segregation (Defined Contribution Plans)?**

_____ Yes _____ No

9. **Loan Balances:**

In the event that there is an outstanding loan against the retirement plan, should the loan amount be included or excluded in the QDRO (Defined Contribution Plans)?

_____ Included _____ Excluded

10. **Are you currently taking distributions from this plan (receiving income)?**

_____ Yes _____ No

11. **Include following items (if available):**

- a. Plan QDRO procedures and/or benefit statement
- b. Divorce decree or settlement agreement

12. **Full payment due when the QDRO checklist is submitted to QDRO Consultants. Payments may be made by cash, check or Paypal (@www.qdroconsultantsllc.com)**

13. **Schedule of Fees:**

* First QDRO	\$325.00
* Initial QDRO Assessment	\$200.00
* Stipulation to Modify Divorce Decree	\$150.00
* Review Existing QDRO And Recommendations	\$200.00
* Letters of Instruction and Acceptance	\$200.00

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QDRO Consultants, LLC

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CONTRACT FOR SERVICES

You have retained QDRO Consultants, LLC, a document preparation service company, to aid in the document preparation of the following service(s), please check appropriate service(s):

- QDRO Preparation Fee: \$725.00
- Initial QDRO Assessment: \$200.00
- Stipulation to Modify Divorce Decree: \$150.00
- QDRO Review and Recommendation: \$200.00
- Letters of Acceptance & Instruction: \$200.00

The client(s) agrees to pay QDRO Consultants, LLC for services rendered prior to QDRO Consultants, LLC producing a draft QDRO for the clients review, unless other arrangements are made. In consideration for said payment, QDRO Consultants, LLC agrees to perform to the best of their abilities and to exhibit due diligence in the conduct of said services. QDRO Consultants, LLC issues no refunds.

QDRO Consultants, LLC is committed to serving YOU in a professional, ethical, and efficient manner at affordable charges.

Client is made aware that no party representing QDRO Consultants, LLC is a licensed attorney in the State of Nevada or any other State. Therefore, we are prohibited from providing legal advice or legal representation to any person, and are prohibited from accepting fees for such advice.

Dated this ____ day of _____, 20__.

Client Signature

Client Signature

QDRO Consultants, LLC Signature