



QDRO HEADQUARTERS

INFORMATION SHEET

Please complete all of the sections below to the best of your ability. Submit this form, and any additional attachments, to our office at the email or fax listed below.

PARTICIPANT (EMPLOYEE):

NAME: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

DATE OF BIRTH: _____

SSN: _____

TELEPHONE: _____

E-MAIL: _____

PARTICIPANT'S ATTORNEY:

NAME: _____

FIRM NAME: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

TELEPHONE: _____

FAX: _____

E-MAIL: _____

ALTERNATE PAYEE (NON-EMPLOYEE):

NAME: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

DATE OF BIRTH: _____

SSN: _____

TELEPHONE: _____

E-MAIL: _____



QDRO HEADQUARTERS
INFORMATION SHEET

ALTERNATE PAYEE'S ATTORNEY:

NAME: _____

FIRM NAME: _____

STREET ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

TELEPHONE: _____

FAX: _____

E-MAIL: _____

CASE MANAGEMENT INFORMATION:

DATE OF MARRIAGE: _____

DATE OF SEPARATION: _____

DATE OF DISSOLUTION: _____

RETIREMENT PLAN(S) INFORMATION (TO BE DIVIDED):

(If more than one plan is being divided, please photocopy this page for additional plans, or provide the information on a separate sheet of paper.)

NAME OF PLAN: _____

NAME OF EMPLOYER: _____

NAME OF PLAN ADMINISTRATOR: _____

PLAN MAILING ADDRESS: _____

PLAN TELEPHONE: _____ PLAN FAX: _____

DATE PARTICIPANT BEGAN EMPLOYMENT: _____

DATE EMPLOYMENT TERMINATED: _____



QDRO HEADQUARTERS

INFORMATION SHEET

FOR CONTRIBUTION PLANS:

IS THERE A LOAN OUTSTANDING?: _____

IF SO, WAS THE LOAN USED FOR A MARITAL PURPOSE?: _____

FOR PENSION PLANS:

IS THE PARTICIPANT RETIRED AND RECEIVING BENEFITS FROM THE PENSION PLAN?:

IF RETIRED UNDER A PENSION PLAN, DID THE PARTICIPANT ELECT SURVIVOR BENEFITS FOR ALTERNATE PAYEE AT THE COMMENCEMENT OF BENEFITS?:

DOCUMENTS TO BE SUBMITTED ALONG WITH YOUR INFORMATION SHEET:

- Copy of the Judgment of Divorce/Separation Agreement that pertains to the division of retirement benefits.
- Recent retirement plan account statement