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ESSENTIAL DOCUMENTS FOR QDRO PREPARATION

1. Parties' Personal Information

Please use Personal Information Form to collect this information in one-sheet

2. Divorce Decree or Judgment

Ensure the copy is complete and accurate. A Certified Copy may be required for some plans and plan administrators, such as FERS, CSRS, and US Military

3. Benefit Estimate (Pensions/Defined Benefit Plans Only)

Order a Pension Benefit Estimate from the Plan Administrator. For best use by your QDRO Attorney, the estimate should generally assume employment ends on the date of divorce, and provide all available benefit options at normal retirement age

4. Benefit Statements (401k/Defined Contribution Plans)

- Most recent statement
- Date of divorce (or separation, or another specific date if not using date of divorce)
- Date of marriage (if deducting pre-marital contributions from the amount to be divided)

5. Signed Release Authorizations

- Plan Administrator Release – so the Plan Administrator can provide documentation and information to the QDRO Attorney
- Social Security Number Release – so the QDRO Attorney can release the party's SSN to the Plan Administrator to process the QDRO