

# 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: (Effective 9/2020)**

* QDRO Preparation fee per document:	\$900.00
* DRO with Letters of Instruction and Acceptance:	\$800.00
* Foreign Decree of Divorce (drafting and filing):	\$550.00
* TSP QDRO Preparation fee per document:	\$500.00
* If inaccurate information is provided, for changes:	\$250.00
* Initial QDRO Assessment during divorce process:	\$250.00
* Stipulation to Modify:	\$250.00
* Review Existing QDRO and Recommendations:	\$250.00
* Research when necessary (per hour)	\$100.00
* Additional fees for certification may apply	

**QDRO Consultants, LLC**  
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775-815-3966 phone 888-268-6652 fax



## ***QDRO Consultants, LLC***

***Melinda C. Cameron, owner/registrant***

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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 per document: \$900.00
- DRO with Letters of Acceptance & Instruction: \$800.00
- Foreign Decree of Divorce (drafting and filing): \$550.00
- TSP QDRO Preparation Fee per document: \$500.00
- If inaccurate information is provided, for changes: \$250.00
- Initial QDRO Assessment during divorce process: \$250.00
- Stipulation to Modify: \$250.00
- Review Existing QDRO and Comments: \$250.00
- Research when necessary (per hour) \$100.00
- Additional fees for certification may apply

The client(s) agrees to pay QDRO Consultants, LLC for services rendered prior to QDRO Consultants, LLC producing a draft QDRO for the client's 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

\_\_\_\_\_  
QDRO Consultants, LLC Signature