

~ **QUESTIONNAIRE FOR QDRO PREPARATION** ~

1. **State Court Information**

Name of Court: \_\_\_\_\_

Case No.: \_\_\_\_\_

2. **Name of Parties as they appear on the pleadings:**

Petitioner: \_\_\_\_\_

Respondent: \_\_\_\_\_

Date of Marriage (Month/Day/Year): \_\_\_\_\_

Date of Separation (Month/Day/Year): \_\_\_\_\_

Date of Divorce (Month/Day/Year): \_\_\_\_\_  
[i.e. date of entry of judgment]

3. Has the Judgment of Dissolution been sent to court for filing? YES or NO [CIRCLE ONE]

PLEASE PROVIDE A COPY OF THE JUDGMENT OF DISSOLUTION or DIVORCE DECREE (PROPOSED IF COMPLETED OR COURT FILED). *If Judgment of Dissolution not yet filed, please provide copy of any court filing in the case for format of pleadings.*

4. **Petitioner Data**

Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_

Cell: \_\_\_\_\_ Home: \_\_\_\_\_

Work: \_\_\_\_\_

Best Telephone to be reached: Cell or Home or Work [CIRCLE ONE]

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Name of Family Law Attorney (if represented by one): \_\_\_\_\_

Name of Law Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Remarried? YES or NO (circle one) If yes, approximate date of remarriage: \_\_\_\_\_

5. **Respondent Data**

Address: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ SSN: \_\_\_\_\_

Cell: \_\_\_\_\_ Home: \_\_\_\_\_

Work: \_\_\_\_\_

Best Telephone to be reached: Cell or Home or Work [CIRCLE ONE]

Email: \_\_\_\_\_ Fax: \_\_\_\_\_

Name of Family Law Attorney (if represented by one): \_\_\_\_\_

Name of Law Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Remarried? YES or NO (circle one) If yes, approximate date of remarriage: \_\_\_\_\_

6. **Identify Participant of the Plan**

Petitioner/Plaintiff or Respondent/Defendant [CIRCLE ONE]

7. **Plan Information\***

EXACT Name of Plan to be divided if known. If not sure, provide all possible names for the Plan.

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Name of Employer, if applicable:

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Name of Custodian or Third Party Plan Administrator, if known (i.e. Fidelity, Aon-Hewitt, Schwab):

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Best known contact (if unknown, someone in Human Resources): \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

8. Is Participant Still Contributing to Plan?

YES or NO or DON'T KNOW [CIRCLE ONE]

9. Has the Plan Been Joined in the Divorce Proceeding?

YES or NO or DON'T KNOW [CIRCLE ONE]

If yes, please provide copy of Joinder pleadings

**\* Provide attorney with a copy of the most recent plan statement (whether monthly quarterly or yearly) and a copy of a statement as of date of division (i.e. date of marital separation or a statement as close to that date as possible or as available)**

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