

QDRO INTAKE QUESTIONNAIRE

Please answer the questions on this sheet as best you can and return this sheet and copies or images of the following documents to me:

- Copy or image of a **retirement plan statement** or other retirement plan correspondence (see #5, below)
- Copy or image of the **first page of a court document** that identifies the court, case number, and your official names in the case (see #6, below)
- Copy or image of the **pages in the divorce decree that say how the retirement account is to be divided**, i.e., how much each person gets (see #7, below)

You can return these documents to me by any of these methods:

Email: juliarueschemeyer@msn.com

Fax: (413) 253-7484

Mail: Attorney Julia Rueschemeyer, 409 Main St #126, Amherst, MA 01002

1. Please provide the following information about the **Employee** ("Plan Participant"). This is the person whose retirement benefits are being divided.

Employee's Name:

Address

Street:

City:

State:

Zip Code:

Telephone Number:

E-mail address:

Social Security Number:

Date of Birth:

2. Please provide the following information about the **Alternate Payee**. This is the spouse or former spouse of the Employee. The Alternate Payee is the person who is being awarded some of the Employee's retirement benefits.

Alternate Payee's Name:

Address

Street:

City:

State:

Zip Code:

Telephone Number:

E-mail address:

Social Security Number:

Date of Birth:

3. What is the **date of divorce?**:
(Even if you are not yet divorced, the QDRO process can still be started)
4. What is the **date of marriage?**:
5. Please provide a **clear copy of a retirement plan statement or other retirement plan correspondence**, if available. This helps me identify the exact name and other details of the retirement plan.
6. Please provide a clear copy of the **first page of a court document that has your divorce case information**, including name of court, case or docket number, and names of spouses as they were listed in the court documents.
7. Please provide a clear copy of the **page(s) in your “separation agreement”** (also called “divorce decree” or “settlement agreement”) **that addresses the division of retirement plan benefits**. This is the page or pages that say how much of the retirement account should be paid to the alternate payee. If it is easier for you, you can just include a copy of the entire separation agreement
8. Please provide as much of the following **information about the Employer** as you can.

Name of Employer:

Address

Street:

City:

State:

Zip Code:

Telephone and/or Fax Number for Human Resources:

E-mail Address for Human Resources:

9. Please provide as much of the following **information** as you can **about the Retirement Plan**. In many cases, the name and address of the Retirement Plan are different from the Employer. It is okay if you do not have all of this information. It can be helpful to include copies or images of any retirement plan documents that include this information.

Name of Retirement Plan:

Address

Street:

City:

State:

Zip Code:

Telephone and/or Fax Number:

E-mail Address:

Name of QDRO Contact Person, if known:

10. **If Participant has a traditional, defined benefit pension** (not a 401k, 403b, or savings type retirement account), please provide the following information about the Participant's employment history:

Date Participant began employment (if available):

Date Participant terminated employment (if applicable):

Is Participant retired? Yes No

Is Participant currently receiving payments from the plan(s)? Yes No

Military Branch of Service: Active Guard or Reserve

Any further information, questions, or concerns that you would like me to know: