

## ATTORNEY CHECKLIST QDRO DRAFTING

**Important Note:** Only attorneys may retain our services. Although our company employs practicing attorneys, we do not represent clients or perform any services for non-lawyers. If you are a party in a divorce and wish to use our services, please have your attorney contact our office.

## To retain our QDRO drafting services, you must provide the following:

<b>Instructions:</b> If you are requesting our office prepare an Order, please provide a copy of the Separation Agreement or Judgement Entry, or in the event that these do not yet exist, instructions on how to divide the benefit.
<b>Prepayment:</b> A minimum of \$200 is required to be considered retained. You may send a check by mail or pay <u>online</u> . Please note we require full prepayment before we prepare any documents, and you can find our complete <u>fee schedule</u> on our website.
Request Form: The QDRO Request Form can be found on our website <a href="here">here</a> .
<b>Plan Information:</b> We require a current Account Statement (for Defined Contribution Plans) or Accrued Benefit Statement (for Defined Benefit Plans).

## **Submit your request:**







Mail

377B Lear Rd, #286 Avon Lake, OH 44012

Please note, if we do not receive the four items listed above (including a minimum \$200 prepayment) within 45 days, we will consider ourselves not to have been retained and will return all documents to you.

Once retained, we may also require additional documents. After reviewing your submission, we will advise you if we require any further documentation. In the event that you have any of the following items, please provide them with your initial submission. This may expedite the process.

- Any additional participant-specific plan information (i.e., balances for use in offset, etc.)
- Model QDRO Language
- Written QDRO Procedures
- Summary Plan Description
- Miscellaneous information/documentation pertinent to the case

This document is meant to be a guide to help attorneys know what they must provide to retain our services. As always, we welcome phone calls. We are glad to discuss the specifics of your case and what information we would need from you to get started.