

**GREGG L. KABACINSKI & ASSOCIATES**

ACTUARIAL AND FINANCIAL CONSULTANTS

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**Initial Data Needs for QDRO, EDRO or DRO Preparation**

The following information is required to prepare a QDRO, EDRO or DRO:

1. Please provide a copy of the divorce judgment (including, at a minimum, the caption page and any pages addressing retirement benefits). If a judgment has not been prepared, please provide a detailed description of the benefits to be awarded.
2. The parties' date of marriage.
3. The parties' date of divorce (if pending, please provide estimated date of divorce).
4. The participant's name, birth date, social security number, and current mailing address.
5. The participant's date of hire.
6. The participant's date of termination, if applicable.
7. The participant's date of retirement, if applicable.
8. If the participant is retired, indicate the form of payment in which the pension is being paid (i.e. single life annuity, joint and survivor annuity, lump sum, etc). If the form of payment is a joint and survivor annuity, then please provide the survivor benefit percentage, and the name, birth date and social security number of the designated beneficiary.
9. The alternate payee's name, birth date, social security number, and current mailing address.
10. The name of the participant's current legal counsel.
11. The name of the alternate payee's current legal counsel.
12. The **exact** plan name and plan administrator's address for each plan to be divided, or the phone number of a contact person who can provide such information. Please also

provide any summary plan descriptions or any plan administrator's QDRO procedures **that you already have.**

13. Our flat fee for drafting a QDRO, EDRO or DRO is \$500. Additional orders for additional plans in the same case are \$400 each. The preceding fees are payable as a retainer prior to beginning work. The preceding fees are flat fees for the requested services and include necessary and reasonable consultations. If problems should arise which will result in additional fees, we will notify you before proceeding.

The above items are typically all that is needed to prepare an order. After receipt of the above items, you will be advised of any additional information which may be necessary to complete an order.

Whom should we contact if we have questions regarding any of the responses to this form?

Name: \_\_\_\_\_

Daytime telephone number: \_\_\_\_\_

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

Please provide any additional comments or questions you may have at this time in the space below.