

## EASY QDRO (QUADRO) INFORMATION WORKSHEET

555 Blanding Blvd., Suite F, Orange Park, FL 32073 Phone: 904 - 264 - 4005 Fax: 1 - 866 - 662 - 9568

(Use this Worksheet/Checklist to provide us the information needed to prepare your "QDRO" or other type of Division Order.)

**Instructions:** This Checklist will refer to the Participant as the employee participating in the retirement plan, and the Alternate Payee as the spouse/former spouse who is seeking to obtain his/her share of the retirement plan. Please answer as many questions as possible, to enable us to properly prepare your plan as quickly as possible. We will contact you to confirm our receipt of this Checklist and to verify any information that may be needed. Incomplete info. may slow the process. Mr. Gardner is a skilled drafting specialist; but, is NOT an Attorney. [If you're requesting that we prepare a Letter of Instruction to divide an IRA, you may skip #'s 6, 7(a) and 7(b).]

1. **Participant's Information** ( This is the Spouse/Former Spouse in the retirement plan):

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip - County: \_\_\_\_\_  
SSN: \_\_\_\_\_ DOB \_\_\_\_\_ Ph. #: \_\_\_\_\_  
Date of Entry into Plan: \_\_\_\_\_ Date of Exit ( If applicable): \_\_\_\_\_  
Email Address: \_\_\_\_\_ Date of Retirement (If applicable): \_\_\_\_\_

**Participant's Attorney's Info.** (If applicable): (  ) **X** here if Participant has no Atty. & go to #2.

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Atty's. Ph. #: \_\_\_\_\_ Fax#: \_\_\_\_\_ Email: \_\_\_\_\_

2. **Alternate Payee's Info.** (This is the Spouse/Former Spouse seeking to obtain their share.):

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip - County: \_\_\_\_\_  
SSN: \_\_\_\_\_ DOB \_\_\_\_\_ Ph. #: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**Alternate Payee's Atty's Info.** (If applicable): (  ) **X** here if Alt. Payee has no Atty. & go to #3.

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Atty's. Ph. #: \_\_\_\_\_ Fax#: \_\_\_\_\_ Email: \_\_\_\_\_

3. Are the Participant and Alternate Payee divorced? Check one. ( ) No. ( ) Yes

4. Date of Divorce: \_\_\_\_\_ Date of Separation: \_\_\_\_\_ Date Married: \_\_\_\_\_  
Date of Division ( Valuation Date of Plan Assets for Division between parties as of ): \_\_\_\_\_

5. Is Participant Currently receiving payments from the plan? Check one. ( ) No. ( ) Yes

6. Is any former spouse of the Participant entitled to Plan benefits through an existing "QDRO"?  
Check one. ( ) No. ( ) Yes

7(a) Please provide the following Information about the **Employer who offers this Plan**:

Employer's Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_

7(b) **Employer's QDRO Contact (This may be the same as the Plan Administrator info. below or it may be a Human Resource Contact dedicated to handling requests related to the Plan. If it's the same, just enter SAME AS #8 BELOW on Contact's Name Line and skip to #8.):**

Contact's Name: \_\_\_\_\_  
Contact's Address (If different than above): \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Contact's Email Address: \_\_\_\_\_ Ph. # \_\_\_\_\_

8. **INFORMATION ABOUT THE PLAN ITSELF: Check here if this is an IRA Plan: \_\_\_\_\_**

Name of Plan: \_\_\_\_\_  
Address of Plan: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_  
Administrator's Name: \_\_\_\_\_  
Administrator's Email Address: \_\_\_\_\_ Ph. # \_\_\_\_\_

**Type of Distribution the Alternate Payee is to Receive?** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Do you know what type Plan this is? Check one. ( ) No. ( ) Yes. If so, Check one below:

- \_\_\_\_\_ Defined Contribution Plan: [401(k)] ..... \$450.
- \_\_\_\_\_ Defined Contribution Plan: [(403 (b))] ..... \$450.
- \_\_\_\_\_ Defined Contribution Plan: [Other Profit Sharing etc]..... \$450.
- \_\_\_\_\_ Defined Benefit Plan: [(Other Pension Plans etc)]..... \$450.
- \_\_\_\_\_ Simple IRA's or Roth IRA ..... \$330.

Federal Government Related Retirement Plans:

- \_\_\_\_\_ Federal Thrift Savings Plan (TSP) ..... \$450.
- \_\_\_\_\_ Civil Service Plans (CSRS) ..... \$450.
- \_\_\_\_\_ Federal Employee Retirement Plans (FERS) ..... \$450.
- \_\_\_\_\_ Military and Military Reserve Plans ..... \$450.

**[If this is a Military Retirement Plan: List the branch of service here: \_\_\_\_\_  
And, If this is a Military Retirement Plan involving "Reserve Duty" enclose a copy of the yearly "Points Statement".]**

**A COPY OF THE FOLLOWING IS NEEDED BEFORE THE QDRO WILL BE PROCESSED:**

- A. Copy of a Statement for the retirement plans account that is being divided.
- B. Copy of Final Judgment (or Settlement Agreement, if applicable, & Final Judgment not yet issued.)
- C. Copy of Summary Plan Description and/or Model QDRO Form & processing info. from the Plan.
- D. Your Check or Money Order for the appropriate amount shown above and in our Fee Schedule.
- E. Copy of signed Contract which is attached hereto. **The contracting Party is our primary contact.**
- F. If the contracting party is attorney using our service, please make sure you include your Bar#.

## EASY QDRO .INFO AGREEMENT FOR SERVICES

This statement sets forth the entire terms of the engagement for the services offered by EASYQDRO.INFO, hereinafter referred to as EASYQDRO and it's owner, Mayo Gardner, a Division Order Specialist, hereinafter, referred to as Mr. Gardner. Unless modified by mutual agreement, in writing, signed by both parties, these terms will control all services to be rendered by EASYQDRO, and, more specifically by Mr. Gardner. When signed by both the Client and Mr. Gardner, this document becomes a binding contract upon both parties. Where used, herein, "Division Order" refers to whatever type of such said order is required by the Plan, ie: "QDRO", "COAP", or in the case of an IRA, a "Letter of Instruction", etc.

The Contracting Client's name is: \_\_\_\_\_

If Contracting Client is an attorney, Bar # is: \_\_\_\_\_

The Contracting Client's address is: \_\_\_\_\_

The Contracting Client's Phone Number is: \_\_\_\_\_

The Contracting Client's Email address is: \_\_\_\_\_

**Contracting Client hereby agrees:**

1. They are contracting with Mr. Gardner, for the sum of \$\_\_\_\_\_ to draft an acceptable "Division Order" for Plan benefits to be divided out to an Alternate Payee, \_\_\_\_\_ from {Name of Plan or IRA} \_\_\_\_\_
2. That the sum figure in Item 1, above, is a flat fee for Mr. Gardner's drafting services. Some plans, not all, allow you to submit your draft to the plan for a pre-approval opinion before you submit it to the Court. And, some of the plans which have this option charge for this service. If we find that your plan offers this option, we will send you or your attorney a letter, at no extra charge, to use for submitting your draft for pre-approval if you or your attorney choose to do so.
3. That it is the Contracting Client's responsibility to furnish all the requested information on the attached **EASY QDRO (QUADRO) INFORMATION WORKSHEET**, and, that should Mr. Gardner have to make the contacts to obtain such information, that it will inevitably slow the process and delay the completion of the Division Order's drafting. Further, in the unlikely event that Mr. Gardner incurs any FEES from the Plan, related to obtaining such information that the Contracting Client will reimburse said costs or fees to Mr. Gardner prior to receiving their proposed draft of the said Division Order.
4. That the Contracting Client is Mr. Gardner's primary contact with reference to this project.

**Contracting Client has the right to expect that:**

1. Mr. Gardner will begin work on the Contracting Client's Division Order immediately upon receiving this signed contract and **all** of the following:
  - A. Payment, in good funds, of his appropriate fee as outlined in his Fee Schedule and entered above. (**Attorney's Checks or Money Orders from individuals** are acceptable forms of payment and **all Checks and Money Orders should be made payable to M. Gardner.**)
  - B. The completed information requested on the **EASY QDRO (QUADRO) INFORMATION WORKSHEET**:
    1. Copy of a **Statement** for the retirement plans account that is being divided.
    2. Copy of **Final Judgment** (or Settlement Agreement, if Final Judgment is not yet issued.)
    3. Copy of **Summary Plan Description** and/or **Plan's Model QDRO Form** & processing info.
2. Should a Division Order not be qualified by the Plan Administrator, Mr. Gardner will redraft said Order as necessary at absolutely no extra charge until it is acceptable to and approved by the Plan Administrator.
3. Mr. Gardner will have the "Order" ready within 5-10 days of the Client meeting all the conditions herein.

**Contracting Client understands that Mr. Gardner is NOT an Attorney: but, a document drafting specialist who does NOT give legal advice and who is sometimes referred to as a Nonlawyer.**

**I/We fully understand the terms set forth, herein, and I/we intend to be bound by this Agreement as evidenced by my/our Signatures below.**

\_\_\_\_\_  
Contracting Client Date: \_\_\_\_\_  
Name: \_\_\_\_\_  
Address & Phone ( See Above)

\_\_\_\_\_  
Mayo Gardner, Nonlawyer Drafting Specialist, Date:  
**555 Blanding Blvd., Suite F,  
Orange Park, FL 32073  
(904) 264 - 4005**