

IRA PLANS - PROVIDE ALL ITEMS BELOW

This is an attachment to our Retainer Agreement for the preparation of an QDRO or equivalent.

Please provide the following items:

1. X Provide a copy of the Property Settlement Agreement
2. X Provide a copy of the Judgment of Divorce(if none provide sample caption).
3. X Provide the following regarding Plaintiff/Petitioner:
 - a. Name _____
 - b. Date of birth. _____
 - c. Social Security Number. _____
 - d. Home address. _____
 - e. Daytime Telephone Number. _____
 - f. Represented by Attorney for QDRO? _____ (yes) or _____ (no)
(if left blank we will presume self-represented / pro-se / pro-per)
 - g. If yes, Name of Attorney. _____
 - (i) Address of Attorney. _____
 - (ii) Attorney email address. _____
 - h. If copies are to be sent to this side please place ✓ in box
(if left blank we will not send copies to this side)
4. X Provide the following regarding Defendant/Respondent:
 - a. Name _____
 - b. Date of birth. _____
 - c. Social Security Number. _____
 - d. Home address. _____
 - e. Daytime Telephone Number. _____
 - f. Represented by Attorney for QDRO? _____ (yes) or _____ (no)
(if left blank we will presume self-represented / pro-se / pro-per)
 - g. If yes, Name of Attorney. _____
 - (i) Address of Attorney. _____
 - (ii) Attorney email address. _____
 - h. If copies are to be sent to this side please place ✓ in box
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5. X Date of marriage (mm/dd/yyyy). _____
6. X Jurisdiction's end of marriage date (cutoff date to be used for acquisition of marital assets), i.e. date of separation, filing of the complaint, service of summons, etc.(mm/dd/yyyy). _____
7. X Provide a copy of each applicable IRA statement as close as possible to the cutoff date for the acquisition of marital assets and to current date. This statement should include the complete name, address and phone number of the financial organization holding the IRA and the account number.
8. X If the former spouse's portion is not to be maintained with the same financial institution provide the complete name and address of the financial institution to which the former spouse's portion is to be transferred, the name on the account and the complete account number.