

# MA State Pension / MTRS Valuation Intake Form

Please fill out the following information and a Certified QDRO Specialist™ will assist you in preparing and reviewing your QDRO.

Name of Pension Plan: MA State Pension/MTRS

Current Monthly Benefit (if in Pay status): \$ \_\_\_\_\_

## Participant Information:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

Date of Divorce or Marital Cut-Off Date (Valuation Date\*): \_\_\_\_\_

Years of Service as of Valuation Date: \_\_\_\_\_ Years \_\_\_\_\_ Months

Are you a military veteran?  Yes  No Are you participating in retirement plans?  Yes  No

What is your high-three average salary (pensionable) as of valuation date? \_\_\_\_\_

Employee Group Number (For State Pensions Only):  1  2  3  4

## Former Spouse (Non-Participant) Information:

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

**\*Important Note:** This valuation does not account for the impact of any reduction in Social Security benefits as a result of the Participant's membership in the State Pension System.

## Financial Planning Consultation

We are a team of experienced advisors that offer comprehensive financial services through **Concord Wealth Partners** to help clients avoid unintended mistakes and improve their long-term financial future after a divorce.

Check here to receive more information about a post-divorce financial planning consultation.

One Kelley Square # 208 Worcester, MA 01610

508-839-3730 (Office) | 508-986-7080 (Fax) | 877-913-3810 (Toll Free) | [www.divorcefinancialsolutions.net](http://www.divorcefinancialsolutions.net) | [adam@divorcefinancialsolutions.net](mailto:adam@divorcefinancialsolutions.net)

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