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.

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