



QDRO INTAKE FORM

DIVORCE FINANCIAL SOLUTIONS

One Kelley Square, Suite 302
Worcester, MA 01610

Phone: 508-839-3730
Fax: 508-986-7080

1. Please provide a copy of the judgment of divorce, specifically pages related to the division of retirement benefits. If the parties are not yet divorced, please provide all documentation referring to anticipated awards.
2. Please provide recent statement for Define Contribution Account (401(k)) or Statement of Benefits for a Define Benefit Pension Plan.
3. The division date for which the alternate payee's benefit is determined, if not clearly spelled out in the divorce decree is _____.

Date of Marriage: _____ Date of Divorce: _____

County you are filing in: _____ Case # _____

Sponsoring Employer: _____

Specific Plan Name: _____

Where should final pre approved documents be mailed?

- Attorney for Client A,
 Attorney for Client B,
 Client A
 Client B

Who will be filing QDRO with the court?

- Attorney for Client A,
 Attorney for Client B,
 Client A
 Client B

CLIENT A - PLAINTIFF/PETITIONER

Full Name: _____ Social Security: _____ Date of Birth: _____

Address: _____

Email Address: _____ Phone Number: _____

CLIENT A- ATTORNEY INFORMATION

Name: _____ Phone Number: _____

Address: _____ Email Address: _____

CLIENT B - DEFENDANT/PETITIONER

Full Name: _____ Social Security: _____ Date of Birth: _____

Address: _____

Email Address: _____ Phone Number: _____

CLIENT B - ATTORNEY INFORMATION

Name: _____ Phone Number: _____

Address: _____ Email Address: _____

PLEASE EXPLAIN ANY TIME CONSTRAINTS, SPECIAL CIRCUMSTANCES AND/OR ISSUES THAT MIGHT APPLY

PLEASE PROVIDE:

- Recent statement for the account being divided
- Page(s) of Separation Agreement relevant to division of assets
- Judgement of Divorce