QDRO Intake Form

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

Required Documents

- ☐ Judgement of Divorce
- ☐ Define Contribution Account (401k) or Statement of Benefits for a Define Benefit Pension Plan
- ☐ Recent statement for account(s) being divided
- ☐ Page(s) of Separation Agreement relevant to asset division

Date of Marriage: ____________________ County Filing In: ____________________

Date of Divorce: ____________________ Case Number: ____________________

Spouse A

First Name: ______________ Last Name: ______________ DOB: ____________

SSN: ______________ Address: ____________________________

City: ______________ State: ______________ Zip Code: ____________

Email Address: ____________________________ Phone: ____________

Attorney Contact Information (if applicable)

Name: ____________________ Firm: ____________________

Email Address: ____________________________ Phone: ____________

Spouse B

First Name: ______________ Last Name: ______________ DOB: ____________

SSN: ______________ Address: ____________________________

City: ______________ State: ______________ Zip Code: ____________

Email Address: ____________________________ Phone: ____________

Attorney Contact Information (if applicable)

Name: ____________________ Firm: ____________________

Email Address: ____________________________ Phone: ____________

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 | adam@divorcefinancialsolutions.net

DIVORCE FINANCIAL SOLUTIONS