

# 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
- Recent statement for account(s) being divided
- Define Contribution Account (401k) or Statement of Benefits for a Define Benefit Pension Plan
- 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](http://www.divorcefinancialsolutions.net) | [adam@divorcefinancialsolutions.net](mailto:adam@divorcefinancialsolutions.net)

The principals of Divorce Financial Solutions, LLC are also investment advisor representatives of, and offer investment advisory services through Concord Wealth Partners, LLC, an SEC-registered investment advisor. This material is for educational and informational purposes only. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that the future performance of any specific investment or investment strategy (including any investments or investment strategies recommended or undertaken by Concord Wealth Partners ("CWP"), or any non-investment related content) will be profitable, equal to any corresponding historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. CWP is neither a law firm nor a certified public accounting firm, and no portion of its services should be construed as legal, accounting, or tax advice. Moreover, you should not assume that any discussion or information contained in this presentation serves as the receipt of, or as a substitute for, personalized investment advice. The current written disclosure discussing advisory services and fees through CWP is available upon request or at <https://concordwealthpartners.com/disclosure/>.

