

*California Divorce Council*

13273 Ventura Boulevard, Suite 101

Studio City, CA 91604

Voice (818) 784-8844 Fax (818) 784-8864

QDRO Checklist for: \_\_\_\_\_

How did find out about California Divorce Council \_\_\_\_\_

1. Participant (Employee) information:

Name:

Current home address:

City, State, Zip:

Telephone Number:

Date of Birth:

Social Security Number:

Email:

2. Alternate Payee (Spouse or Former Spouse) information: specify which one)

Name:

Address:

City, State, Zip:

Telephone Number:

Date of Birth:

Social Security Number:

Email:

3. Are the Participant and Alternate Payee divorced? ( ) No ( ) Yes

4. What is the date of divorce (Entry of Judgment)?

5. What is the date of marriage?

6. What is the date of separation?

7. How many retirement plans does the Participant (employee) participate in?
8. Does the Participant have benefits or balances with more than one employer? ( )  
Yes ( ) No
9. Is a previous spouse entitled to benefits through an existing QDRO? ( ) Yes  
( ) No
10. Please provide the following information about the Employer (Plan):  
Name of Employer:  
Address, City, State, Zip of Employer:  
Employer Contact: (HR person)  
Telephone Number:
11. Please provide the following information about the Participant's employment history:  
Date Participant began employment:  
Date Participant terminated employment:  
Is the Participant retired? ( ) Yes ( ) No  
Is the Participant currently receiving payments from the plan? ( ) Yes ( ) No
12. What is the *exact* name of the Plan(s):
13. Is this a Federal civil service plan? ( ) Yes ( ) No
14. Is this a military plan? ( ) Yes ( ) No
15. Does the Pension Department or HR contact have a "model" they want followed?  
( ) Yes ( ) No If yes, please attach.
16. If Defined Contribution (i.e. 401(k), IRA, etc.), How will it be divided?
17. If a Defined Benefit Plan (Pension):  
a. Should benefits based on **your** life expectancy **or** the other party?  
b. Do you want to begin receiving as soon as Participant is *eligible* to retire, or when he *actually* retires? Note: Payments will be actuarially reduced if taken early.

Please attach a copy of the Judgment (Decree) or Petition in the divorce case.

**\*\*\*\*\*Agreement with California Divorce Council (CDC)\*\*\*\*\***

I understand that California Divorce Council (hereafter referred to as CDC) will prepare the paperwork for a Qualified Domestic Relations Order (QDRO) procedure for me. The fee for this service will be \$ 450.00 (or \$500.00 if Pension Plan must be joined to the divorce), and that there is a filing fee of \$20.00. I understand this is the complete fee, and included any and all revisions that may be needed to obtain “approval”. If a certified copy is required by the Plan, there will be a fee of \$35.00 for this request.

I understand that Jolene Dashut is not an attorney and may not perform the legal services that an attorney performs. I understand that the County Clerk has not evaluated or approved the registrant’s services, and that I may obtain information regarding free or low-cost representation through a local bar association or legal aid foundation and that I, the consumer may contact local law enforcement, a district attorney, or a legal aid foundation if I believe that I have been a victim of fraud, the unauthorized practice of law, or any other injury.

A Legal Document Assistant (formerly known as an Independent Paralegal) is not permitted to engage in the practice of law, including providing any kind of advice, explanation, opinion, or recommendation to a consumer about possible legal rights, remedies, defenses, options, selection of forms, or strategies.

I understand that I have the right to rescind this contract within 24 hours of the signing of it. I may cancel this contract by giving Jolene Dashut any written statement to the effect that the contract is canceled. I further understand that the majority of my paperwork will be completed at the initial meeting, and therefore agree that if I cancel my contract with CDC, that only fifty percent of the fee paid to CDC would be refundable.

Dated:

---

Client