

EDS, LLC. QDRO
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*Please complete the following to the best of your ability, if all information is not available simply state "NA" or Not Available at this time and we will attempt to obtain required information in the future.

*Please provide a copy of the Divorce Decree, or if there is no decree yet any documentation of what the anticipated benefit might be awarded to the Alternate Payee.

* The date of division which the Alternate Payee's benefit is determined. If not determined, estimated date of Divorce Decree. _____

* Please provide any information regarding the Plan(s) involved (i.e. Summary Plan Descriptions, Statements, and Sample QDRO's) that you have obtained.

* Please use a different form for each employer if multiple employers are involved.

County _____ Court _____ Case Number _____

Date of Marriage _____

Date of Divorce or Legal Separation _____
_____ check here if pending

Date Action for Divorce or Separation was filed _____

Is employee hourly or salaried? _____

Participant's (employee's) Date of Hire _____

Employer contact phone number _____

Has employee retired? /Date _____

Has employee terminated employment? /Date _____

Have Pension payments commenced? _____

Plan Name (#1) _____

Plan Name (#2)

Plan Name (#3)

Participant Information

Full Name

Social Security Number

Date of Birth

Street Address

City, State, Zip

Phone Number

Alternate Phone Number

Alternate Payee Information

Full Name

Social Security Number

Date of Birth

Street Address

City, State, Zip

Phone Number

Alternate Phone Number

The following questions apply to Defined Contribution Plans Only

401(k) plans, 403(B) plans, 457 plans, etc...

Is it the parties' intent that the alternate payee receive a percentage %_____or a flat amount \$_____ and should this amount include a proportionate share of any investment gains and losses from the division date to the date of distribution? ____yes ____no

If an outstanding loan balance does exist or may have existed, in the participant's account as of the division date, how do the parties want it treated?

____ Include loans (larger amount to divide)

____ Exclude loans (smaller amount to divide)

____ There are no loans

Is there a premarital amount (Considered Separate Property) that is to be excluded from the division? ____yes ____no

Are unvested amounts that accumulated during the marriage to be included? ____yes ____no

Many Plans charge a processing fee that is taken out of the Participant's account. Do the parties intend to split this cost if charged or will the Participant bear the cost? (check one)

Split Cost: _____ Participant Pays: _____ Alternate Payee pays:_____.

The following questions apply to Defined Benefit Plans Only (Pensions)

Are early retirement benefits to be divided? ____yes ____no

Will the alternate payee share in post- retirement cost of living increases? ____yes ____no

Is the alternate payee to be treated as the participant's surviving spouse for pre-retirement surviving spouse ____yes ____no

-If yes, it is the parties intent that the Alternate Payee receive (check one):

The entire survivor annuity

The portion of the survivor annuity necessary to maintain the level of benefits paid to
The Alternate Payee while the Participant was living

The amount of the survivor annuity that is attributable to the marital period

Other

Is the alternate payee to be treated as the participant's surviving spouse for post-retirement surviving spouse benefits if a lifetime annuity is not selected by the alternate payee? yes no

If yes, check a choice below:

The entire survivor annuity

The portion of the survivor annuity necessary to maintain the level of benefits paid to the
Alternate Payee while the Participant was living

The amount of the survivor annuity that is attributable to the marital period

Other (please explain)

Is the alternate payee to have the right to commence benefits at any time after the participant's earliest retirement age? yes no

Other Considerations

Please choose your method of delivery of the QDRO(s):

Email – Secure Adobe Acrobat PDF document.

Email Address: _____

Hard Copy

Please explain any time constraints, special circumstances and issues that apply to this case in the space provided below:

