

VOIT ECONOMETRICS GROUP, Inc.

A Forensic Economics Advisory Firm

*Authors of Retirement Plan Benefits and QDROs in Divorce
(a CCH Publication)*

QDRO CHECKLIST

Full Name of Parties:

Petitioner: _____

Respondent: _____

Retained by:

Attorney for Husband

Attorney for Wife

Jointly

Complete, and most recent, **Addresses** of each party

Attorney Contact Information: _____

Petitioner: _____

Respondent: _____

Social Security Numbers of each party

Petitioner: ____ - ____ - ____

Respondent: ____ - ____ - ____

Dates of Birth of each party

Petitioner: _____

Respondent: _____

Date of Divorce & Date of Division (if different): _____

(Effective date of dividing retirement plan, as of date, and significance of effective date)

Date of Marriage: _____

County & State of Action: _____

Case No.: _____

Name of Plan Participant: _____

Percentage/Dollar Amount of Award: _____

Precise Name of Plan: _____

Copy of applicable portion(s) of
Judgment/**Marital Settlement Agreement** specific to retirement benefits

(& front page – style of case)

Account Statement or Benefit Statement

Summary Plan Description – if possible and if available)

FEE ! (payable in advance or before commencement of work) **Who is responsible for Payment?** _____

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QDRO Distributions & IRA Rollovers offered through Voit & Company, LLC, A Registered Investment Advisory Firm