

# Information Required to Prepare a Defined Contribution QDRO

## Plan Information

Plan Name: \_\_\_\_\_

Plan Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Contact Address: \_\_\_\_\_

Date of Participation: \_\_\_\_\_ Date of Termination: \_\_\_\_\_

Plan Participant is:                      The Alternate Payee is (Check One):

Husband	Wife	Ex-Spouse	Other/Child	_____
			Address:	_____
				_____
			Birth Date:	_____
			SSN:	_____
				_____

## Defined Contribution QDROs

**Amount Assigned:** Choose below how the amount of benefit assigned to the alternate payee is to be determined:

**Coverture:** \_\_\_\_\_ % of the marital portion of the participant's account as of the Assignment Date where the marital portion is determined as the months of the Participant's Participation in the Plan during the Marriage divided by the Participant's total months of Participation as of the Assignment Date.

**Percentage:** \_\_\_\_\_ % of the participant's account as of \_\_\_\_\_

**Dollar Amount** \$ \_\_\_\_\_ of the participant's account as of \_\_\_\_\_

**Other:** \_\_\_\_\_

**Investment Income:** Indicate below whether the amount assigned to the alternate payee as of the assignment date shall be credited with investment income realized by the participant's account from the assignment date until the date the separate account is established for the alternate payee.

The alternate payee's account **shall** be credited with investment income

The alternate payee's account **shall not** be credited with investment income

**Plan Loans:** Indicate whether the participant's account shall include any outstanding participant loan? The actual amount assigned to the alternate payee will not include any outstanding participant loan.

In determining the amount assigned, the participant's account **shall** include any loan amount

In determining the amount assigned, the participant's account **shall not** include any loan amount

**Account Number:** If the QDRO is being prepared to divide a 403(b) annuity or an IRA, please supply the Participant's account number as well as the account number of the Alternate Payee into which the assigned interest is to be transferred. If this section does not apply, indicate N/A.

Participant's Account Number \_\_\_\_\_

Alternate Payee's Account Number \_\_\_\_\_