



## STEPS TO TAKE NEXT:

In order to retain our services, please do the following:

1. Click on the **Contact Us** link and we will get back in touch with you as quickly as we can.
2. When you decide to use our services, fill out the **QDRO Information Form** completely. You do not have to be represented by an attorney for us to complete the QDRO for you; but, if you are currently being represented, be sure to list his or her name on page 2 of the form.
3. Send us the completed Form, along with a full and complete copy of your Final Court Order and/or Agreement, whatever document specifies the division of the retirement plan in question and other items requested to the mailing address provided.
4. We will let you know we have opened a file. If we need additional information, we may ask you to provide us with relevant information regarding the specific retirement plan, such as account statements, guidelines and procedures for the Plan. If you have a military or civil service pension, it is not necessary to provide this information, as we can obtain it for you.
5. When we have all of the documents and information in hand and you have hired us to do your work, we will promptly draft an Order that meets your specific needs. Each Order is drafted specifically for your particular circumstances. We will provide it to you and/or your attorney (or you and your spouse, if you are working together on this). We want to answer any questions you have, so we encourage you to email or call with your inquiries, so we can be sure you understand the contents of the Order.
6. With the exception of military and federal civil service plans, we will forward the drafted and agreed upon Order to the particular Plan Administrator, for review and pre-approval. This is important, because it avoids having to redraft the Order later in the event there are some especially picky details a plan wishes to put in place. This is where the advantage of an attorney is invaluable to read and understand what issues the Plan Administrator raises. We will make the necessary and appropriate amendments to the Order, which still accomplish the necessary result and will be sure you, your lawyers and/or the parties understand them.
7. When those steps are taken, the QDRO will be ready for you and/or your lawyer to take to the Judge in your jurisdiction (and we do these nationwide) to have the Order signed. You will then send certified copies of the QDRO to the Plan Administrator or to the relevant office in the event of a civil service or military plan to have them implemented.