

RETIREMENT PLAN INFORMATION WORKSHEET

****PLEASE COMPLETE A SEPARATE WORKSHEET FOR EACH PLAN BEING DIVIDED****

It is very important that you complete ALL the information requested in this Worksheet. Failure to do so may delay our ability to draft your Order(s).

Name of person who is providing information below _____

Plan Name (provide official name, if known) _____

Name of Employee (or former employee) _____

Name of Employer (or former employer) _____

Employer Contact Number _____

Employee Hire Date (if exact date unknown please indicate whether employee was hired prior to, or after, date of marriage and provide year of hire, if known) _____

Type of Employee Hourly _____ Salaried _____

Employee Status Active Employee _____
Terminated but Not Retired _____ Termination Date _____
Retired and Receiving Benefits _____ Retirement Date _____

Plan Type (check one) _____ Defined Benefit (pension)
 _____ Defined Contribution (401k, 403b, IRA, etc.) ****SUBMIT RECENT ACCOUNT STATEMENT****

If not clearly spelled out in the Judgment, provide the intended date on which the benefit awarded to the non-employee spouse (Alternate Payee) is to be calculated/divided (Division Date) _____

For Defined Benefit Plans only:

If not provided for in the Judgment and if allowed under the Plan, is the Alternate Payee to have the right to commence his or her assigned share of the benefit at any time the Plan allows (regardless whether Employee has retired)?

Yes _____ No _____

For Defined Contribution Plans only:

If not specified in the Judgment, is the Alternate Payee’s share of the Plan to be adjusted by investment gains and losses from the Division Date to the date the funds are distributed to the Alternate Payee? Yes _____ No _____

If the Judgment does not address loans against the account as of the Division Date and the Alternate Payee is to receive a percentage of the account (rather than dollar amount), how should the loan be treated in determining the portion of the account to be divided?

_____ Include loans (larger amount being divided/loan does not impact Alternate Payee’s share)

_____ Exclude loans (smaller amount being divided with Alternate Payee’s share being reduced)

_____ There are no loans

Was there a balance in the account on the date of marriage? Yes _____ No _____ Unknown _____

PLEASE EXPLAIN ANY TIME CONSTRAINTS, SPECIAL CIRCUMSTANCES OR OTHER ISSUES THAT APPLY TO THE DIVISION OF THIS RETIREMENT PLAN IN THE SPACE PROVIDED BELOW: