

QDRO CHECKLIST

Attorneys should utilize this checklist to monitor cases that involve QDROs and other domestic relations orders. Following this checklist ensures you have all important information in one place and can determine whether your QDRO work is accomplished. Use a checklist for each plan and keep the checklist in the front of each client's file.

1. Name of Client: _____

Participant Alternate Payee

2. Opposing Party: _____

Participant Alternate Payee

3. Full and Accurate name of benefit plan: _____

Type of Plan: Defined Contribution Defined Benefit Military FERS/CSRS Other

Date of Divorce: _____
(mm/dd/yyyy)

QDRO or other domestic relations order filed with the Court of Common Pleas in _____ County: _____
(mm/dd/yyyy)

QDRO or other domestic relations order sent to Plan Administrator: _____
(mm/dd/yyyy)

In addition to the order, please see other information that may be important to submit:

State pensions: If Participant was required to designate Alternate Payee as a beneficiary on the joint and survivor annuity plan of payment, a copy of the Judgment Entry was also submitted to the proper retirement system

Military Retired Pay: DFAS Form 2293 and DFAS Form 2656-10 (if applicable) were submitted to the appropriate addresses

FERS/CSRS: Certified copy of COAP and an application letter were submitted

QDRO approved by Plan Administrator as qualified: _____
(mm/dd/yyyy)

Qualification letter from Plan Administrator approves and interprets the QDRO in accordance with the intent of the parties.

Copy of qualification letter from Plan Administrator sent to client with termination letter:

(mm/dd/yyyy)

File closed: _____
(mm/dd/yyyy)