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INDIVIDUAL RETIREMENT ACCOUNT (IRA) / KEOGH / INDIVIDUAL 401(k) QUESTIONNAIRE

Note: QDROs are not always required to divide IRAs, Keogh, or Individual 401(k) Plans. Prior to retaining QDRO Helper, you must call the company who manages the account to verify that they require a QDRO before the account can be divided due to divorce or legal separation.

Name of IRA Participant/Account Owner: _____

Full Name of the Account: _____

IRA Account/Certificate Number(s): _____

Name of Administrator/Financial Institution: _____

Administrator Mailing Address: _____

City: _____ State: _____ Zip: _____

Admin. Phone: (____) _____ Admin. Fax: (____) _____

Date Account Opened: ____ / ____ / _____

Is the Participant retired and receiving monthly distributions from the account: Yes No

If yes, date of retirement was: ____ / ____ / _____

Were any loans taken during the marriage? Yes No

If yes, the loan shall be deemed: community property **OR** Participant's separate property

I have verified with the Administrator that a QDRO is required to divide the account: Yes No

If possible, please send QDRO Helper a copy of a recent IRA statement from the plan administrator.
Please send a formal statement document, not an online account printout.

Please send QDRO Helper a copy of any previously filed court orders regarding the retirement account.
Please describe any agreement between you and your former spouse regarding the division of the account that is not addressed in your marital settlement agreement or judgment:

