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**QUESTIONNAIRE: SDCERA**

Name of Member/Retirement Plan Participant: \_\_\_\_\_

Member's Date of Plan Membership: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

If Date of Plan Membership is not known, was it:  Before **or**  After the Date of Marriage

**If the Member is RETIRED, answer the following question:**

Date of retirement: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

**If the Member is NOT YET RETIRED, answer the following question:**

If your marital settlement agreement or judgment does not specify the method of division, which method of division do the parties agree to use (see chart on next page for more information):

Separate Account **OR**  Shared Payment

If you chose the SHARED METHOD, if Nonmember dies before Member:

- Nonmember's share shall terminate and will not revert to the Member or be payable to Nonmember's beneficiaries, **or**
- Nonmember's share shall revert to participant, **or**
- Nonmember's share will continue to Nonmember's beneficiaries during Member's lifetime.

**Please send QDRO Helper a copy of any DROs or court orders previously filed regarding this retirement plan.** Please describe any agreement between you and your former spouse regarding the division of the retirement plan that is not addressed in your Marital Settlement Agreement or Judgment:

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NOTE: SDCERA requires a joinder filed with the court before it can divide a Member's benefits pursuant to a DRO. Please ask your family law attorney or SDCERA if a joinder has been filed already; if already filed, please send a copy of the joinder to QDRO Helper. If no joinder has been filed, QDRO Helper can complete the joinder for an additional fee of \$200.00.

I will require QDRO Helper's joinder service:  Yes  No

If yes, please submit an additional \$200 with your client deposit.

## SDCERA

### Summary of Methods of Dividing Community Property For Active and Deferred Members

	<b>Separate Account</b>	<b>Shared Payment</b>
<b>Retirement Date and Receipt of Benefit Payment</b>	<p>Member and Nonmember make independent decisions on when to apply for retirement and begin receipt of monthly benefits.</p> <p>Nonmember is eligible to retire either when he/she meets the age and service credit requirements to retire <b>or</b> when the member meets the age and service credit requirements to retire.</p>	<p>Member and Nonmember begin to receive monthly benefits when Member retires.</p> <p>Nonmember cannot receive any monthly benefits from SDCERA until Member retires.</p>
<b>Benefit Payment Option</b>	<p>Member and Nonmember make independent elections for benefit payment option.</p>	<p>Unless the court order directs otherwise, Member must select Option 4, which provides Nonmember with a lifetime benefit based on his/her percentage interest in Member's retirement.</p>
<b>Member or Nonmember Dies BEFORE Retirement</b>	<p><b>Member's death:</b> Standard death benefits available based on years of service remaining in account.</p> <p><b>Nonmember's Death:</b> Beneficiary receives a refund of accumulated contributions.</p>	<p>If Member <b>has not remarried</b>, Nonmember receives community property percentage interest in death benefits.</p> <p>If Member <b>has remarried</b>, the court reserves jurisdiction over Nonmember's entitlement to monthly benefits of the surviving spouse.</p>
<b>Member or Nonmember Dies AFTER Retirement</b>	<p>Benefit continuance based on retirement benefit payment option selected at retirement (by each party).</p>	<p><b>Member's death:</b> Monthly continuance available to beneficiary named at date of retirement (if any). Nonmember's benefit is not affected by Member's death (due to Option 4 election).</p> <p><b>Nonmember's Death:</b> Monthly benefits will stop. An actuarial provision must be made for a continuance to Member or other beneficiary.</p>

This chart is for informational purposes only, it is not intended to be legal advice.

Questions about SDCERA, and requests for benefit estimates, should be directed to:

SDCERA  
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 619-515-6800