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SDCERS QUESTIONNAIRE

Name of SDCERS Member: _____

Member's Date of Plan Membership (often the same as Date of Hire): ____ / ____ / ____

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

If Nonmember Spouse dies before Member, all benefits payable to Nonmember Spouse will:

Be paid to Nonmember's named beneficiary or estate **or** Revert to Member

If the Member is RETIRED, answer the following questions: (Note: this information is required – please contact SDCERS at (619) 525-3600 if you cannot answer all questions below.)

Date of retirement: ____ / ____ / _____

Benefit Option elected at retirement: _____

Options include: Unmodified, Option 1 (Cash Refund Annuity), Option 2 (100% Joint & Survivor), Option 3 (50% Joint & Survivor), and Option 4 (Multiple Beneficiaries).

Name of Member's beneficiary (if any): _____

Is Member receiving a disability retirement? Yes No

What gross dollar amount of benefit is Member currently receiving per month? \$ _____

Please send QDRO Helper a copy of any 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:

NOTE: SDCERS requires a joinder of employee benefit plan be filed with court before it can divide a Member's benefits pursuant to a DRO. Please ask your family law attorney if a joinder has been filed for your case; 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 flat fee of \$200.00.

I require QDRO Helper's joinder service: Yes No