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University of California Retirement Plan (UCRP) Questionnaire

Name of UCRP Member: _____

Member’s Date of Plan Membership: _____ / _____ / _____

Does Member have a **Capital Accumulation Provision (CAP) Account**? Yes **or** No

Is the Member currently **RETIRED** and receiving monthly benefits? Yes **or** No

If the Member is RETIRED, answer the following questions: *(This information is required – please contact the UC Benefits Center at 800-888-8267 if you cannot answer all questions below.)*

Date of retirement: _____ / _____ / _____

At retirement, did the Member name the former spouse as Contingent Annuitant? Yes **or** No

Please send QDRO Helper a copy of any QDROs 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:

NOTE: A “joinder of employee benefit plan” must be filed with court and served on the UCRP before the UCRP can divide a Member’s benefits pursuant to a QDRO. If a joinder has already been filed for your case, please send a copy of the joinder forms to QDRO Helper. **If a joinder has not yet been filed, QDRO Helper can complete the joinder for you for an additional flat fee of \$200.00.**

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

NOTE: The UC System also offers the following retirement plans:

- 1. The University of California Tax-Deferred 403(b) Plan
- 2. The University of California Defined Contribution Plan
- 3. The University of California 457(b) Deferred Compensation Plan

These three plans require separate QDROs; these accounts cannot be addressed in the UCRP DRO. These benefits are managed by Fidelity Employer Services Company LLC, who can be reached at 866-682-7787. Please let us know if you need to divide any of these Fidelity plans due to your divorce or legal separation and we will send you the appropriate questionnaire for those accounts.