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ORDER CHECKLIST

- ☐ 1. **Signed Fee Agreement** for the service option selected (i.e. Single Party Representation, Two Party Representation, Review Services, etc.).
- ☐ 2. **Payment** as described in the Fee Agreement. To expedite your order, if you and your former spouse are splitting the cost, please provide your half of the payment and notify your former spouse to send the other half of the payment to our office.
- ☐ 3. Fully Completed **Parties and Marital Information Questionnaire**.
- ☐ 4. Fully Completed **Questionnaire for each retirement plan** being divided.
- ☐ 5. A copy of the following pages of your **court paperwork** and/or settlement agreement:
 - ☐ Filed form FL-180 Judgment showing the court location, parties' names, and case number. If your Judgment (FL-180) has not yet been filed, please instead provide us with a copy of the filed FL-100 Petition **and** FL-120 Response forms.
 - ☐ Page(s) of the settlement agreement showing the parties' date of marriage and date of separation.
 - ☐ Settlement agreement pages describing the division of retirement benefits for the QDRO(s) you have ordered – remember to include any "Exhibit" pages from the end of the agreement as well as language within the body of the agreement that references the retirement plan(s).
 - ☐ Signature page signed by all parties and/or the judge.
- ☐ 6. Any **separate written agreement** between the parties regarding the division of the retirement plan(s) that is not part of your court paperwork.
- ☐ 7. If possible, please provide a **copy of a plan statement** or other correspondence sent by the plan administrator, particularly if it relates to community property, QDROs, or the division of the retirement assets in divorce.
- ☐ 8. A copy of each **joinder** that has been filed and served on the retirement plan administrator(s), if any. Joinders are most commonly required for city, county, or state government retirement benefits, and rarely for private employers. Joinders are never served on federal government retirement plans.

Please call email QDRO Helper if you have any questions about the information needed to process your QDRO.

NOTE FOR MAC COMPUTER USERS: Please open and save the PDF forms with Adobe Reader, **not** Mac's Preview Program. Forms completed in Preview will appear blank upon receipt by QDRO Helper.