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PARTIES INFORMATION QUESTIONNAIRE

Send all Correspondence to:

For Party 1: ☐ Party 1 **or** ☐ Party 1's Attorney
For Party 2: ☐ Party 2 **or** ☐ Party 2's Attorney

PARTY 1 INFORMATION: ☐ Mr. ☐ Ms. ☐ Mrs. Other: _____

NAME - First: _____ Middle: _____ Last: _____

Street Address: _____

City: _____ State: _____ Zip code: _____

Cell phone: (____) _____ Home phone: (____) _____

Social Security Number: ____ - ____ - ____ Date of Birth: ____ / ____ / ____

Email address: _____

Party 1 prefers to receive the QDRO via (choose **one** only): ☐ US Mail **or** ☐ Email (PDF)

Party 1's Family Law Attorney (only if currently represented):

Name: _____ Firm name: _____

Street Address: _____

City: _____ State: _____ Zip code: _____

Phone: (____) _____ Fax: (____) _____

Email address: _____

PARTY 2 INFORMATION: ☐ Mr. ☐ Ms. ☐ Mrs. Other: _____

NAME - First: _____ Middle: _____ Last: _____

Street Address: _____

City: _____ State: _____ Zip code: _____

Cell phone: (____) _____ Home phone: (____) _____

Social Security Number: ____ - ____ - ____ Date of Birth: ____ / ____ / ____

Email address: _____

Party 2 prefers to receive the QDRO via (choose **one** only): ☐ US Mail **or** ☐ Email (PDF)

This form was completed by: ☐ Party 1 ☐ Party 2 ☐ Both parties jointly

Note: Social Security Numbers and dates of birth are required by plan administrators for tax purposes.

Party 2's Family Law Attorney (only if currently represented):

Name: _____ Firm name: _____

Street Address: _____

City: _____ State: _____ Zip code: _____

Phone: (____) _____ Fax: (____) _____

Email address: _____

Marital Information (in MM/DD/YYYY format)

Date of marriage: _____ / _____ / _____

Date of separation: _____ / _____ / _____

Date of dissolution or legal separation: _____ / _____ / _____

IMPORTANT: Please also provide a copy of the following pages of your Judgment of Dissolution, Judgment of Legal Separation, or Marital Settlement Agreement:

1. First Page/Cover Page showing the name of court, case number and parties' names. (Usually on Form FL-180, Petition FL-100, or Response FL-120).
2. Page(s) specifying your date of marriage and date of separation.
3. Page(s) explaining how the retirement benefits are to be divided (included any exhibits at the end of the document).
4. Signed signature page (parties', judge, and attorneys' signatures).

How did you choose QDRO Helper?

☐ Internet/Google Search (Search terms used: _____)

☐ Attorney Recommendation (Attorney's Name: _____)

☐ Recommended by Friend/Colleague

☐ Yelp Reviews ☐ Avvo.com

☐ Other: _____