



Domestic Relations Order Application

PARTICIPANT: (Owner of Retirement Account or Pension)

Name: _____

Social Security Number: _____

Date of Birth: _____

Current Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Participant Attorney's Name: _____

Participant Attorney's Address: _____

Phone: _____ Email: _____

ALTERNATE PAYEE: (Spouse, Child, or Dependent Receiving Funds)

Name: _____

Social Security Number: _____

Date of Birth: _____

Current Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Alternate Payee Attorney's Name: _____

Alternate Payee Attorney's Address: _____

Phone: _____ Email: _____

MARRIAGE AND DIVORCE:

Date of Marriage: _____

Date of Divorce: _____

PRIVATE EMPLOYER RETIREMENT PLAN INFORMATION

(Please include latest account statement(s) with completed application.)

Retirement Account #1

Plan Name [e.g., Amazon 401(k)]: _____

Employer Name/Plan Sponsor: _____

Plan Administrator (e.g., Fidelity, Vanguard, etc.): _____

Retirement Account #2 (if needed):

Plan Name: _____

Employer Name/Plan Sponsor: _____

Plan Administrator: _____

Retirement Account #3 (if needed):

Plan Name: _____

Employer Name/Plan Sponsor: _____

Plan Administrator: _____

If a retirement account listed above relates to a pension plan (Defined Benefit Plan), please provide the following information, if available:

Participant/Employee Hire Date: _____ Still Employed? _____

Date of Termination: _____ Date of Retirement: _____

Is Participant currently receiving benefits from this plan? _____

If retired, did Participant elect survivor benefits for the Alternate Payee? _____

STATE PENSION PLAN INFORMATION:

State: _____

State Agency where employed: _____

Retirement System (for SC Plans): SCRS? _____ PORS? _____
GARS? _____ JSRS? _____

Date of Hire: _____

Date of Retirement (if retired): _____

TERI Participant? _____ TERI Start Date? _____

If retired, did Participant list Former Spouse as a Survivor Beneficiary? _____

If so, which option? _____

REQUIRED DOCUMENTS:

_____ Settlement Agreement and/or Divorce Decree

_____ Most recent monthly/quarterly account statement

_____ Signed Fee Agreement (available on website under “Services”)

REQUESTED DOCUMENTS (if readily available):

_____ Plan’s QDRO Procedures and/or Model Language

_____ Summary Plan Description

Please email application and above documents to reed@simplyqdros.com.

If you have questions, please contact us at your convenience. We look forward to working with you.