

# Troyan & Associates, P.A.

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*The QDROAttorney.com Firm*

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PRACTICE DEDICATED TO PENSIONS / QDROs / VALUATIONS

## Data Request Form

This form is now available on our website: <https://www.troyanlaw.com/qdro-forms>

This data request form is part of the Troyan & Associates, P.A. - General Retainer Terms & Conditions for the preparation of an QDRO or equivalent.

1. Provide a copy of the Property Settlement Agreement  
(if none provide a narrative as to how asset(s) to be divided)
2. Provide a copy of the Judgment of Divorce(if none provide sample caption).
3. Date of marriage \_\_\_\_\_(mm/dd/yyyy).
4. Jurisdiction's end of marriage date (cutoff date to be used for acquisition of marital assets),  
i.e. date of separation, filing of the complaint, service of summons, etc.  
\_\_\_\_\_(mm/dd/yyyy).
5.  Provide the following regarding Plaintiff/Petitioner:
  - a. Name \_\_\_\_\_
  - b. Date of birth. \_\_\_\_\_
  - c. Social Security Number. \_\_\_\_\_
  - d. Home address. \_\_\_\_\_
  - e. Email address. \_\_\_\_\_
  - f. Daytime Telephone Number. \_\_\_\_\_
  - g. Represented by Attorney for QDRO? (yes) or (no)  
(if left blank we will presume self-represented / pro-se / pro-per)
  - h. If yes, Name of Attorney. \_\_\_\_\_  
(i) Address of Attorney. \_\_\_\_\_  
(ii) Attorney email address. \_\_\_\_\_
  - i. Sent to copies to this side? (yes) or (no)  
(if left blank we will not send copies to this side)

6. X Provide the following regarding Defendant/Respondent:
- a. Name \_\_\_\_\_
  - b. Date of birth. \_\_\_\_\_
  - c. Social Security Number. \_\_\_\_\_
  - d. Home address. \_\_\_\_\_
  - e. Email address. \_\_\_\_\_
  - f. Daytime Telephone Number. \_\_\_\_\_
  - g. Represented by Attorney for QDRO? (yes) or (no)  
*(if left blank we will presume self-represented / pro-se / pro-per)*
  - h. If yes, Name of Attorney. \_\_\_\_\_  
(i) Address of Attorney. \_\_\_\_\_  
(ii) Attorney email address. \_\_\_\_\_
  - i. Sent to copies to this side? (yes) or (no)  
*(if left blank we will not send copies to this side)*
7. Provide specific plan(s) names, QDRO to be drafted against:
- 1.) \_\_\_\_\_ 2.) \_\_\_\_\_
  - 3.) \_\_\_\_\_ 4.) \_\_\_\_\_
8. For a Defined Contribution Plan/Account (401(k), IRA, 457b, 403b) against which QDRO to be drafted - provide the following:
- a. A statement as close as possible to the jurisdiction' end of marriage date and current date.
  - b. If there were contributions made into this Plan/Account prior to the marriage , provide the date of first contribution: \_\_\_\_\_ (mm/dd/yy) and a statement as close as possible to that date.
  - c. Provide the most recent version of the *Summary Plan Description ("SPD")* and a copy of the Domestic Relations Order guidelines.

9. For Defined Benefit Pension Plan (traditional pension) provide the following:
- a. An accrued benefit estimate/statement which provides the employee's date of hire, date of participation, credited service and accrued benefit as of the applicable cut off date, which would be payable at normal retirement age.
  - b. Provide most recent version of the *Summary Plan Description ("SPD")* **and** a copy of the Domestic Relations Order guidelines.
  - c. If retired and collecting: Provide date of retirement \_\_\_\_\_(mm/dd/yy) and benefit calculation showing the retirement option elected and the beneficiary named, if any. This should also include the party's date of hire, participation, credited service, date of termination and any other data used to make the calculation.

Send us documents:

Email: [info@TrojanLaw.com](mailto:info@TrojanLaw.com)

-or-

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Please Click "[Make Payment](#)" Secure Payments:

