

Date of Marriage \_\_\_\_\_

Date of Divorce \_\_\_\_\_

Name of Employer \_\_\_\_\_

Participant's Date of Hire \_\_\_\_\_

Employer Contact Phone Number \_\_\_\_\_

Is Participant Retired? \_\_\_\_\_

Retirement/Termination Date \_\_\_\_\_

Number of Plans to be divided \_\_\_\_\_

Official Plan Name (#1) \_\_\_\_\_

Official Plan Name (#2) \_\_\_\_\_

Official Plan Name (#3) \_\_\_\_\_

### Participant Information:

Full Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

### Alternate Payee Information:

Full Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Date of Birth \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

### The following questions apply to Defined Contribution Plans only (401k plans, profit sharing, 457 plans, etc.):

Is it the parties' intent that the alternate payee receives a proportionate share of any investment gains and losses from the division date to the date of distribution? **(Check one)**       Yes     No

If an outstanding loan balance existed, or may have existed, in the participant's account as of the division date, how do the parties want it treated? **(Check one)**

- Include loans (larger amount to divide)  
 Exclude loans (smaller amount to divide)  
 There are no loans

Is there a premarital amount that is to be excluded from the division? **(Check one)**     Yes     No

### The following questions apply to Defined Benefit (Pension Plans) Plans only:

Are early retirement benefits to be divided? **(Check one)**     Include     Exclude

Will the alternate payee share in post retirement cost of living increases? **(Check one)**     Yes     No

Is the alternate payee to be treated as the participant's surviving spouse for the pre-retirement surviving spouse benefits? **(Check one)**                      Yes    No

If yes, it is the parties' intent that the alternate payee receive (check one):

- The entire survivor annuity,  
 The portion of the survivor annuity necessary to maintain the level of benefits paid to the alternate payee while the participant was living  
 The amount of the survivor annuity that is attributable to the marital period  
 Other (please explain)

Is the alternate payee to have the right to commence benefits at any time after the participant's earliest retirement age? **(Check one)**     Yes     No