



P.O. Box 4396 Allentown, PA 18105-4396 1-800-447-0084 - Fax: 610-770-9342

www.pensionappraisers.com www.qdrodesk.com

DOMESTIC RELATIONS ORDER CHECKLIST FOR CONNECTICUT STATE RETIREMENT SYSTEM PLANS

Option #1: Online - Answer questions at www.qdrodesk.com. Upon completion download the Order immediately. Unlimited Support 1-877-770-2270 (Toll Free) Cost - \$299. Pre-approval with the Plan Administrator may be available for an additional \$100 fee after an analyst in the office completes the free 9-point review process.

Option #2: In House - Complete this checklist and mail it with payment to Pension Appraisers. Our staff will prepare the Order and return it within 7-10 business days. Unlimited Support 1-800-447-0084 (Toll Free). Cost - \$495. You may opt in to our Pre-approval process on the last page for an additional \$75 fee.

Both Options are Supported by Pension Appraisers Staff

REQUESTOR INFORMATION:						
Name:						
Firm Name:			(if you are an attorney)			
Attorney ID (if applicable):			(if you are an attorney)			
Mailing Address:			<u> </u>			
City:	State:	Zip Code:				
Telephone #:	Fax #:					
E-mail Address:						
If you are one of the Parties of (If you are an attorney and have	f the divorce who is rep already completed the s	resented by an atte ection above please	orney please provide your attorney's disregard.)			
Name:						
Attorney ID (if applicable):						
Firm Name:			<u></u>			
Mailing Address:	ailing Address:					
City:	State:	Zip Code:				
Telephone #:	Fax #:					
E-mail Address:						
Should the attorney's name a	nd/or firm name, addres	ss and telephone n	umber appear above the			
Legal Caption? Yes	No					
If Yes:						
Attorney's Nam	ne Firm's N	lame				
Are you the (or, if atto	rney, who do you repre	sent?):				
Plaintiff / Petition	oner Defend	ant / Respondent				
Should we send a cop	y of the Order to oppos	ing counsel?	Yes No			
If Yes:						
Opposing Counsel's N	lame:					
Firm Name:						
Mailina Address:						

	City:	State:	Zip Code: _						
	Telephone #:	Fax #:							
	E-mail Address:								
2.	COURT INFORMATION:								
	Name of Court:								
	State:								
	Division:	Docket Nun	nber:						
	Which party is considered the plaintiff/p	Which party is considered the plaintiff/petitioner?							
	PARTNER 1 - The Participant: (Employee Spouse)								
	PARTNER 2 - The Alternate Paye	ee: (Non-Employee Sp	ouse)						
	In addition to the Judge's, what signatu	In addition to the Judge's, what signature lines should come at the end of the Order?							
	None	Attorney	s for Both Partne	ers					
	Both Partners Opposing	g Atty. Name:		_					
3.	PARTNER 1 - The Participant: (Employe	ee Spouse)							
	Name of Participant:	Name of Participant:							
	Date of Birth:								
	Last Known Mailing Address:								
	City, State, Zip Code:								
	Phone:								
	Social Security Number:	Gender:	Male	Female					
4.	PARTNER 2 - The Alternate Payee: (Nor	PARTNER 2 - The Alternate Payee: (Non-Employee Spouse)							
	Name of Alternate Payee:	Name of Alternate Payee:							
	Date of Birth:								
	Last Known Mailing Address:								
	City, State, Zip Code:								
	Phone:								
	Social Security Number:	Gender:	Male	Female					
5.	MISCELLANEOUS INFORMATION:								
	Should Social Security Numbers appear in the Order? Yes No								
	Marriage Date:								
	Are the Parties Divorced? Yes _	No <u>If Yes:</u>	Date of Divorce:						
	Cut-off date for marital property rights: (Cut-off date used to determine marital coverture fraction i.e. separation date, complaint date, or divorce date								
	Plan Name to which this Order applies:								
	Connecticut Municipal Employees Retirement System (CMERS)								
	Connecticut State Employees Retirement System (CSERS)								
	State of Connecticut Teachers' Retirement System (CTRS)								
	Hartford Municipal Employee Re	Hartford Municipal Employee Retirement Fund							
	Other - Exact Plan Name:								

	(The number of other plan of	one reason Orders are document showing the	rejected is been complete, con	cause the	e plan na al name c	me is wrong. Please provide a statement of the plan.)
		nt Joined The Plan: _				
						Termination Date:
	Is the Particip	ant receiving retireme	nt benefits?	Yes	No	o If Yes: Retirement Date:
6 A .	ANSWER THE	SE QUESTIONS ONLY	IF THE PART	ICIPANT	IS RETIF	RED AND RECEIVING BENEFITS,
	I.	Percent or Dollar Am the Alternate Payee?	ount of Emplo	yee's mo	onthly ret	irement benefit to be paid by the Plan to
		Dollar Amount: \$ _				
		Percent: %				
		Option #1: Per receive a percent pre-marital and po	ercent of Total age of the total acci ost-marital credited	as of the rued benefit service).	Date of as of the D	Retirement: The Alternate payee will ate of Retirement. (This option includes any
		Option #2: Pe Property Compon credited service the months of credited	ercent of the M lent shall be determ he Employee earned d service earned the	arital Po ined by a fr d during the rough the D	rtion as of action, the remarriage attention action.	of the Date of Retirement: The Marital numerator of which is the number of months of nd the denominator of which is the total number of ement.
	II.	Should the Alternate Adjustments if offere	Payee receive d by the Plan?	a pro-ra	ita share	of any Post-retirement Cost of Living
		Yes	_ No			
	III.	Should the Alternate	Payee receive	a pro-ra	ta share	of any Early Retirement Subsidies?
		(Most defined benefit pensic unreduced benefits if they could be perfect they could receive at employee would receive at employee could receive \$1, month for life if they had not per month).	No on plans have early omplete a specific r ension by eliminatin normal retirement a 000 per month at ac t completed the requ	retirement number of y g the actua ge verses a ge 65, but i uired numbe	provisions the ears of serviced adjustment of the early retired the following the early retired to find the early retired to find the early ears of years of the early e	nat allow an employee to retire early with full ice. By doing this the company is subsidizing a large ent (the difference in the amount of monthly benefit an ement age if there is no subsidy - Example: An cts to retire at age 55 he/she would receive \$500 per of service to receive the unreduced benefit of \$1,000
	IV.	Should the Alternate interim supplements not considered by the	Payee receive or temporary e Plan Adminis	a pro-ra benefits strator to	ta share that beco be a pai	of any early retirement supplements, ome payable to the Participant which are t of the Participant's accrued benefit.?
		Yes (Most defined benefit pension additional supplemental, intropplemental benefit to age	No on plans have early erim or temporary b 62, at which time th	retirement enefits. Ex ne employe	incentives tl ample: If ar e would be	nat allow certain eligible employee's to retire early with a employee retires at age 55, the plan could pay a able to collect Social Security.)
6B.	ANSWER THE EMPLOYMEN	SE QUESTIONS ONLY T BUT IS NOT RECEIV	IF THE PART	ICIPANT ENT BEN	IS STILL EFITS, O	EMPLOYED OR HAS TERMINATED THERWISE ANSWER 6A:
	l.	Percent or Dollar Am the Alternate Payee?	ount of Emplo	yee's mo	onthly ret	irement benefit to be paid by the Plan to
		Dollar Amount: \$ _				
		Percent: %				
		Option #1: Pe	ercent of Total yee will receive a pe	as of a Sercentage o	Specific D	Pate which is corrued benefit as of a Specific Date.
		Option #2: Pe Property Compon credited service the months of credite	ercent of the M lent shall be determ he Employee earned d service earned the	arital Po ined by a fr d during the rough the D	rtion as cation, the remarriage a	of the Date of Retirement: The Marital numerator of which is the number of months of nd the denominator of which is the total number of ement.
		Option #3: Pe Property Compon credited service the months of credite	ercent of the M lent shall be determ he Employee earned d service earned the	arital Po ined by a fr d during the rough the M	rtion as of action, the remarriage a	of the Marriage End Date: The Marital numerator of which is the number of months of nd the denominator of which is the total number of Date.
		Option #4: Pe Specific Date Component shall the earned from credited service e	ercent of the Me which is be determined by a the Date of Marriago arned through the S	arital Po fraction, the to a Speci Specific Dat	rtion as on the second as of the second	The Marital Property of which is the number of months of credited service of the denominator is the total number of months of
		Option #5: Pe percentage of the credited service)	rcent of Total a total accrued bene	as of Mai fit as of the	r riage En Date Marria	d Date: The Alternate Payee will receive a ge Ended. (This option includes any pre-marital

		•	its if offered b	-			
		Yes	No	1			
	III.	Should the	Alternate Pay	ee receive a	pro-rata share of	any Early Retiremer	nt Subsidies?
		(Most defined unreduced be portion of the employee wou employee coumonth for life per month).	benefit pension planefits if they comple employee's pension ld receive at normald receive \$1,000 pt if they had not com	ans have early retete a specific nun n by eliminating the al retirement age per month at age pleted the require	irement provisions that hober of years of service. ne actuarial adjustment verses an early retirements, but if he/she elects and number of years of se	allow an employee to retire By doing this the compar (the difference in the amou ent age if there is no subsi- to retire at age 55 he/she vervice to receive the unredi	e early with full ny is subsidizing a large unt of monthly benefit ar dy - Example: An would receive \$500 per uced benefit of \$1,000
	IV.	Should the interim surnot consid (This ques	e Alternate Pay oplements or t lered by the Pl tion is N/A if t	ee receive a emporary be an Administr he Participan	pro-rata share of nefits that becom ator to be a part of t has terminated of	any early retirement e payable to the Par of the Participant's a employment)	t supplements, ticipant which are ccrued benefit?
		Yes (Most defined additional sup supplemental	benefit pension pla plemental, interim benefit to age 62, a	ans have early ret or temporary ben at which time the	irement incentives that a efits. Example: If an er employee would be able	allow certain eligible emplo nployee retires at age 55, t e to collect Social Security.	oyee's to retire early with the plan could pay a .)
	V.	Should the event the I	e Alternate Pay Participant die	ee designate s prior to rea	ed as a beneficiary ching retirement?	for any death bene	efits payable in the
		Yes	If Yes: _	The Alt	ternate Payee sha id all death benefi	II be designated as temporary to the place of the place o	the beneficiary for an.
		No	OR: _	The Ali death compo	benefits payable t	II be designated as to the extent of the r	the beneficiary for narital property
			nate Davee nr	adacaasas th	e Particinant nrio	r to commencement	of henefits the
		Alternate I	Payee's portion	n of the Partic	cipant's benefit sh	r to commencement nall:	or belieffts, the
		Re	vert to the Par	ticipant. OR	Be paid to (Some Plans	o the Alternate Payers do not allow this under the	ee's estate. eir guideline)
	VI.	Alternate F	Payee as the b his/her lifetime	eneficiary in	order to ensure p	etirement option and ayment of benefits t	to the Alternate
		Yes	-		t Option:		
			Description	on:			
		No					
7.	For an addition	onal fee of \$7	75.00: Should	we submit the	e Order to the Pla	n Administrator for	pre-approval?
	Yes	No <u>lf Y</u>	<u>'es:</u> In order f	or us to obta	in pre-approval yo	ou <u>MUST</u> provide the	e following:
	Admi	nistrator's Na	ame:				_
	Addre	ess:					
	City:						
	Telephone #:						_
8.	Payment can be made by Check, Money Order or Credit Card.						
	Credi	t Card:	MC	Visa	Amex	Discover	
	Credi	t Card #:					
			Expiration	n Date:	/	CVV:	
	Name as it ap	pears on the	credit card: _				
	Billing address	s of the credit	card:				_
	Checks and M	Ioney Orders	 should he mad	e navable to E	Pension Annraisers	Inc	_
	PLEASE NOT FAX THIS RE	E: Requests QUEST FOR	with personal c M TO: 610-770	hecks will be 9342 (only if	held for two weeks paying by credit ca	, Inc. to ensure that the ch rd) 5, Allentown, PA 1810	eck clears.

Should the Alternate Payee receive a pro-rata share of any Post-retirement Cost of Living

II.