



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 NEW MEXICO 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):			
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:			
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: County:					
	Division: Docket Number:					
	Which party is considered the plaintiff/petitioner?					
	PARTNER 1 - The Participant: (Employee Spouse)					
	PARTNER 2 - The Alternate Payee: (Non-Employee Spouse)					
	In addition to the Judge's, what signature lines should come at the end of the Order?					
	None Attorneys for Both Partners					
	Both Partners Opposing Atty. Name:					
3.	PARTNER 1 - The Participant: (Employee Spouse)					
	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: (Non-Employee Spouse)					
	Name of Alternate Payee:					
	Date of Birth:					
	Last Known Mailing Address:					
	City, State, Zip Code:					
	Phone:					
	Social Security Number: Gender: Male Female					
	MISCELLANEOUS INFORMATION:					
	Should Social Security Numbers appear in the Order? Yes No					
	Marriage Date:					
	Are the Parties Divorced? Yes No If Yes: 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:					
	Public Employees Retirement Association (PERA)					
	State of New Mexico Deferred Compensation Plan (DCP)					
	New Mexico Educational Retirement Board (ERB)					
	Other - Exact Plan Name:					
	(The number one reason Orders are rejected is because the plan name is wrong. Please provide a state or other plan document showing the complete, correct legal name of the plan.)					

DRO - NEW MEXICO STATE AND LOCAL GOVT DEFINED BENEFIT CHECKLIST

	Is the Particip	ant still employed? Yes No <u>If No:</u> Termination Date:				
	Is the Particip	ant receiving retirement benefits? Yes No <u>If Yes:</u> Retirement Date:				
6 A .	ANSWER THESE QUESTIONS ONLY IF THE PARTICIPANT IS RETIRED AND RECEIVING BENEFITS, OTHERWISE SKIP TO 6B:					
	l.	Percent or Dollar Amount of Employee's monthly retirement benefit to be paid by the Plan t the Alternate Payee?				
		Dollar Amount: \$				
		Percent: %				
		Option #1: Percent of Total as of the Date of Retirement: The Alternate payee will receive a percentage of the total accrued benefit as of the Date of Retirement. (This option includes any pre-marital and post-marital credited service).				
		Option #2: Percent of the Marital Portion as of the Date of Retirement: The Marital Property Component shall be determined by a fraction, the numerator of which is the number of months of credited service the Employee earned during the marriage and the denominator of which is the total number of months of credited service earned through the Date of Retirement.				
	II.	Should the Alternate Payee receive a pro-rata share of any Post-retirement Cost of Living Adjustments if offered by the Plan?				
		Yes No				
	III.	Should the Alternate Payee receive a pro-rata share of any Early Retirement Subsidies?				
		Yes (Most defined benefit pension plans have early retirement provisions that allow an employee to retire early with full unreduced benefits if they complete a specific number of years of service. By doing this the company is subsidizing a large portion of the employee's pension by eliminating the actuarial adjustment (the difference in the amount of monthly benefit a employee would receive at normal retirement age verses an early retirement age if there is no subsidy - Example: An employee could receive \$1,000 per month at age 65, but if he/she elects to retire at age 55 he/she would receive \$500 per month for life if they had not completed the required number of years of service to receive the unreduced benefit of \$1,000 per month).				
	IV.	Should the Alternate Payee receive a pro-rata share of any early retirement supplements, interim supplements or temporary benefits that become payable to the Participant which ar not considered by the Plan Administrator to be a part of the Participant's accrued benefit.?				
		Most defined benefit pension plans have early retirement incentives that allow certain eligible employee's to retire early wi additional supplemental, interim or temporary benefits. Example: If an employee retires at age 55, the plan could pay a supplemental benefit to age 62, at which time the employee would be able to collect Social Security.)				
6B.	ANSWER THE EMPLOYMEN	SE QUESTIONS ONLY IF THE PARTICIPANT IS STILL EMPLOYED OR HAS TERMINATED TO BUT IS NOT RECEIVING RETIREMENT BENEFITS, OTHERWISE ANSWER 6A:				
	I.	Percent or Dollar Amount of Employee's monthly retirement benefit to be paid by the Plan the Alternate Payee?				
		Dollar Amount: \$				
		Percent: %				
		Option #1: Percent of Total as of a Specific Date which is The Alternate Payee will receive a percentage of the total accrued benefit as of a Specific Date.				
		Option #2: Percent of the Marital Portion as of the Date of Retirement: The Marital Property Component shall be determined by a fraction, the numerator of which is the number of months of credited service the Employee earned during the marriage and the denominator of which is the total number of months of credited service earned through the Date of Retirement.				
		Option #3: Percent of the Marital Portion as of the Marriage End Date: The Marital Property Component shall be determined by a fraction, the numerator of which is the number of months of credited service the Employee earned during the marriage and the denominator of which is the total number of months of credited service earned through the Marriage End Date.				
		Option #4: Percent of the Marital Portion as of a Specific Date which is Component shall be determined by a fraction, the numerator of which is the number of months of credited servic the earned from the Date of Marriage to a Specific Date and the denominator is the total number of months of credited service earned through the Specific Date.				
		Option #5: Percent of Total as of Marriage End Date: The Alternate Payee will receive a percentage of the total accrued benefit as of the Date Marriage Ended. (This option includes any pre-marital credited service)				
	II.	Should the Alternate Payee receive a pro-rata share of any Post-retirement Cost of Living Adjustments if offered by the Plan?				
		Yes No				

	III.	Should the Al	ternate Paye	e receive a p	ro-rata share of	any Early Retiremen	nt Subsidies?
		Yes (Most defined beneunreduced benefits portion of the employee would re employee could re month for life if the per month).	No efit pension plans is if they complete oyee's pension beceive at normal ceive \$1,000 per y had not comple	s have early retire e a specific numb by eliminating the retirement age vo r month at age 65 eted the required	ement provisions that er of years of service actuarial adjustment erses an early retirem , but if he/she elects number of years of s	allow an employee to retire. By doing this the compare (the difference in the amorent age if there is no subsite to retire at age 55 he/she ervice to receive the unred	e early with full ny is subsidizing a large unt of monthly benefit an dy - Example: An would receive \$500 per uced benefit of \$1,000
	IV.	Should the Alinterim supple not considere (This question	ternate Paye ements or te d by the Pla n is N/A if the	e receive a p mporary ben n Administra e Participant	ro-rata share of efits that becom tor to be a part o has terminated	any early retiremen e payable to the Par of the Participant's a employment)	t supplements, ticipant which are ccrued benefit?
		Yes (Most defined bendadditional supplemental bendamental	No efit pension pland ental, interim or efit to age 62, at	s have early retire temporary benefi which time the er	ement incentives that its. Example: If an ei nployee would be abl	allow certain eligible emplo mployee retires at age 55, e to collect Social Security	oyee's to retire early with the plan could pay a)
	V.	Should the Allevent the Part	ternate Paye icipant dies	e designated prior to reac	l as a beneficiar hing retirement?	y for any death bene	efits payable in the
		Yes	If Yes:	The Alte	rnate Payee sha	all be designated as its payable by the pl	the beneficiary for an.
		No	OR:	The Alte death be compor	rnate Payee sha enefits payable nent.	ıll be designated as to the extent of the r	the beneficiary for narital property
		If the Alternate	e Payee pred	deceases the	Participant prio	r to commencement	of benefits, the
		If the Alternate Payee predeceases the Participant prior to commencement of benefits, the Alternate Payee's portion of the Participant's benefit shall: Revert to the Participant. OR Be paid to the Alternate Payee's estate.					
	VI.	(Some Plans do not allow this under their guideline) Should the Participant be required to elect a specific retirement option and designate the Alternate Payee as the beneficiary in order to ensure payment of benefits to the Alternate Payee for his/her lifetime?					
		Yes	If ves: Nam	ne of Benefit	Option:		
					•		
		No	•				
7.	For an addition	nal fee of \$75.0	0: Should w	e submit the	Order to the Pla	n Administrator for	pre-approval?
						ou <u>MUST</u> provide the	
			='			 •	.
	Addre						_
				State	: Zin	Code:	_
	•			State: Zip Code: Fax #:			_
	10106				, · ·		
8.	Payment can	be made by Ch	eck, Money (Order or Cred	lit Card.		
	Credit	Card:	MC	Visa _	Amex _	Discover	
	Credit	Card #:					
			Expiration	Date:	/	CVV:	
	Name as it app	ears on the cred	lit card:				
	Billing address	of the credit car	d:				_
	-		_				_
	Checks and M	onev Orders sho	uld be made	pavable to Pe	ension Appraisers	. Inc.	
	PLEASE NOT FAX THIS REC MAIL THIS RE Any questions	E: Requests with QUEST FORM T QUEST FORM regarding this Re	n personal cho O: 610-770-9 ΓΟ: Pension / equest Form	ecks will be he 1342 (only if pa Appraisers, In or fees, pleas	eld for two weeks aying by credit ca c., P.O. Box 4390 e call us toll free	i, Inc. to ensure that the ch rd) 5, Allentown, PA 1810 at 1-800-447-0084.	eck clears. 05

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III.