



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 WASHINGTON 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

## 1. **REQUESTOR INFORMATION:**

Name:			
Firm Name:			
Attorney ID (if applicable):			(if you are an attorney)
Mailing Address:			_
City:	State:	Zip Code:	
Telephone #:	Fax #:		
E-mail Address:			
If you are one of the Parties of the dive (If you are an attorney and have already	orce who is rep completed the s	presented by an atto section above please of	rney please provide your attorney's disregard.)
Name:			
Attorney ID (if applicable):			
Firm Name:			_
Mailing Address:			_
City:	State:	Zip Code:	
Telephone #:	Fax #:		
E-mail Address:			
Should the attorney's name and/or fire	n name, addres	ss and telephone nu	mber appear above the
Legal Caption? Yes No			
<u>If Yes:</u>			
Attorney's Name	Firm's N	Name	
Are you the (or, if attorney, wh	o do you repre	sent?):	
Plaintiff / Petitioner	Defend	ant / Respondent	
Should we send a copy of the	Order to oppos	sing counsel?	Yes No
lf Yes:			
Opposing Counsel's Name:			
Firm Name:			
Mailing Address:			

	City:		-	
	Telephone #:			
	E-mail Address:			
C	COURT INFORMATION:			
Ν	lame of Court:			
S	State:	County:		
C	Division:	Docket Nur	nber:	
۷	Which party is considered the plaintiff/	petitioner?		
_	PARTNER 1 - The Participant: (E	Employee Spouse)		
_	PARTNER 2 - The Alternate Pay	ee: (Non-Employee Sp	ouse)	
lı	n addition to the Judge's, what signatu	ure lines should come	at the end of the Order?	
_	None	Attorney	/s for Both Partners	
_	Both Partners Opposin	g Atty. Name:		
F	PARTNER 1 - The Participant: (Employ	ee Spouse)		
Ν	lame of Participant:			
C	Date of Birth:			
	.ast Known Mailing Address:			
C	City, State, Zip Code:			
P	Phone:			
S	Social Security Number:	Gender:	Male Female	
F	PARTNER 2 - The Alternate Payee: (No	n-Employee Spouse)		
Ν	lame of Alternate Payee:			
C	Date of Birth:			
L	ast Known Mailing Address:			
C	City, State, Zip Code:			
P	Phone:			
S	Social Security Number:	Gender:	Male Female	
Ν	<b>MISCELLANEOUS INFORMATION:</b>			
S	Should Social Security Numbers appea	r in the Order?	Yes No	
Ν	/arriage Date:			
A	Are the Parties Divorced? Yes _	No <u>If Yes:</u>	Date of Divorce:	
<b>C</b>	Cut-off date for marital property rights: Cut-off date used to determine marital co	verture fraction i.e. sep	aration date, complaint date, or divorce	date.)
P	Plan Name to which this Order applies:	:		
_	Washington Department of Reti	rement Systems		
_	Seattle Employees Retirement S	System		
	Other - Exact Plan Name:			

or other plan document showing the complete, correct legal name of the plan.)
Date Participant Joined The Plan: \_\_\_\_\_

	Is the Participa	ant still employed?	Yes	No	<u>lf No:</u>	Termination Date:	
	Is the Participa	ant receiving retirement	benefits?	Yes	No	If Yes: Retirement Date: _	
6 <b>A</b> .	ANSWER THE OTHERWISE S	SE QUESTIONS ONLY I KIP TO 6B:	F THE PAF		IS RETIRI	ED AND RECEIVING BENE	FITS,
	Ι.	Percent or Dollar Amount the Alternate Payee?	unt of Emp	loyee's mo	nthly reti	rement benefit to be paid b	y the Plan to
		Dollar Amount: \$					
		Percent: %					
		Option #1: Perc receive a percentage pre-marital and post	e of the total a marital credite	al as of the ccrued benefit ad service).	Date of R as of the Da	etirement: The Alternate payer te of Retirement. (This option includ	es any
		Option #2: Perce     Property Componen     credited service the     months of credited s	<b>cent of the</b> t shall be dete Employee ear ervice earned	Marital Por rmined by a fra ned during the through the Da	tion as of action, the nu marriage an ate of Retirer	the Date of Retirement: merator of which is the number of r d the denominator of which is the to nent.	The Marital nonths of Ital number of
	П.	Should the Alternate P Adjustments if offered	ayee recei by the Pla	ve a pro-rat n?	a share c	f any Post-retirement Cos	t of Living
		YesN	10				
	III.	Should the Alternate P	ayee receiv	ve a pro-rat	a share o	f any Early Retirement Sub	osidies?
		Yes N (Most defined benefit pension unreduced benefits if they com portion of the employee's pens employee would receive at nor employee could receive \$1,000 month for life if they had not co per month).	<b>lo</b> plans have ea plete a specifi ion by elimina mal retiremen per month at ompleted the re	rly retirement p c number of ye ting the actuari t age verses ar age 65, but if equired numbe	rovisions that ears of servic al adjustmer n early retire he/she elect r of years of	at allow an employee to retire early e. By doing this the company is su tt (the difference in the amount of m ment age if there is no subsidy - E s to retire at age 55 he/she would no service to receive the unreduced be	with full bsidizing a large ionthly benefit an xample: An eceive \$500 per enefit of \$1,000
	IV.	Should the Alternate P interim supplements of not considered by the	ayee receiv r temporar Plan Admii	ve a pro-rat y benefits t histrator to	a share o hat becor be a part	f any early retirement sup ne payable to the Participa of the Participant's accrue	olements, int which are d benefit.?
		Yes Most defined benefit pension additional supplemental, interin supplemental benefit to age 62	<b>lo</b> plans have ea n or temporar 2, at which time	rly retirement ir / benefits. Exa e the employee	ncentives that imple: If an would be al	at allow certain eligible employee's t employee retires at age 55, the plar ple to collect Social Security.)	o retire early with 1 could pay a
6B.		SE QUESTIONS ONLY I	F THE PAR G RETIREI		IS STILL I EFITS, OT	EMPLOYED OR HAS TERN HERWISE ANSWER 6A:	IINATED
	I.	Percent or Dollar Amount the Alternate Payee?	unt of Emp	loyee's mo	nthly reti	rement benefit to be paid b	y the Plan to
		Dollar Amount: \$					
		Percent: %					
		Option #1: Perc The Alternate Payee				rued benefit as of a Specific Date.	
		Option #2: Perc Property Componen credited service the months of credited s	<b>cent of the</b> t shall be dete Employee ear ervice earned	Marital Por rmined by a fra ned during the through the Da	tion as of action, the nu marriage an ate of Retirer	the Date of Retirement: The number of which is the number of r d the denominator of which is the to nent.	The Marital nonths of Ital number of
		Option #3: Perce Property Componen credited service the months of credited s	<b>cent of the</b> t shall be dete Employee ear ervice earned	Marital Por rmined by a fra ned during the through the Ma	tion as of action, the nu marriage an arriage End I	t <b>the Marriage End Date:</b> The merator of which is the number of r d the denominator of which is the to Date.	ne Marital nonths of Ital number of
		Option #4: Perc Specific Date w Component shall be the earned from the credited service earr	vhich is determined by Date of Marria	a fraction, the	numerator o	<b>a</b> The Marital of which is the number of months of the denominator is the total number	Property credited service of months of
		Option #5: Perc percentage of the to credited service)	ent of Tota tal accrued be	I as of Marinefit as of the [	r <b>iage End</b> Date Marriag	<b>Date:</b> The Alternate Payee will r e Ended. (This option includes any	eceive a pre-marital

II. Should the Alternate Payee receive a pro-rata share of any Post-retirement Cost of Living Adjustments if offered by the Plan?

γ	es		No	

III.		-	•		f any Early Retireme	
	Yes (Most defined benefits portion of the empl employee would re employee could re month for life if the per month).	No efit pension plans ha s if they complete a i loyee's pension by e eceive at normal retil ceive \$1,000 per mo y had not completed	ave early retireme specific number o iliminating the act rement age verse onth at age 65, bu d the required nun	nt provisions tha f years of servic uarial adjustmer s an early retirer ti fi he/she elect nber of years of	at allow an employee to retir e. By doing this the compa it (the difference in the amo ment age if there is no subs is to retire at age 55 he/she service to receive the unrec	re early with full ny is subsidizing a large unt of monthly benefit an idy - Example: An would receive \$500 per duced benefit of \$1,000
IV.	Should the Ali interim supple not considere (This questior	ternate Payee r ements or temp d by the Plan A n is N/A if the P	eceive a pro- orary benefit dministrator articipant has	rata share o s that becor to be a part s terminated	f any early retiremen ne payable to the Pa of the Participant's a l employment)	nt supplements, rticipant which are accrued benefit?
	Yes (Most defined bene additional supplem supplemental bene	<b>No</b> efit pension plans ha lental, interim or terr efit to age 62, at which	ave early retireme porary benefits. ch time the emplo	nt incentives tha Example: If an o yee would be at	at allow certain eligible empl employee retires at age 55, ole to collect Social Security	oyee's to retire early with the plan could pay a ⁄.)
۷.	Should the Ali event the Part	ternate Payee c icipant dies pri	lesignated as or to reachin	a beneficia g retirement	ry for any death benet?	efits payable in the
	Yes	If Yes:	The Alterna any and all	ite Payee sh death bene	all be designated as fits payable by the p	the beneficiary for lan.
	No	OR:	The Alterna death bene componen	ite Payee sh fits payable t.	all be designated as to the extent of the	the beneficiary for marital property
	If the Alternate	e Payee predec	eases the Pa	rticipant prie	or to commencemen shall:	t of benefits, the
	-	-	_		to the Alternate Pay ans do not allow this under the time of time of the time of the time of time of the time of t	
				-		
VI.	Should the Pa Alternate Paye Payee for his/	rticipant be rec ee as the benef her lifetime?	quired to elec iciary in orde	t a specific r to ensure	retirement option and payment of benefits	d designate the to the Alternate
	Yes	If yes: Name	of Benefit Op	tion:		
	No	Description:				
For an additio	onal fee of \$75.0	0: Should we s	ubmit the Ord	der to the Pl	an Administrator for	pre-approval?
					you <u>MUST</u> provide th	
	nistrator's Name		•	••••••	•	5
Addre						
City:			State:	Zir	o Code:	
-						
Pavment can	be made by Che	eck. Monev Ord	ler or Credit (	Card.		
-	Card:				Discover	
		Expiration Da				
Name as it app	pears on the cred					
	of the credit car					
Checks and M	oney Orders sho	uld be made pa	vable to Pensi	on Appraiser	rs, Inc.	

**PLEASE NOTE:** Requests with personal checks will be held for two weeks to ensure that the check clears. FAX THIS REQUEST FORM TO: 610-770-9342 (only if paying by credit card) MAIL THIS REQUEST FORM TO: Pension Appraisers, Inc., P.O. Box 4396, Allentown, PA 18105 Any questions regarding this Request Form or fees, please call us toll free at 1-800-447-0084.

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