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**Information* Needed to Draft Domestic Relations Order
for Federal (FERS & CSRS) Plans**

- | | |
|--|--|
| <input type="checkbox"/> Date of Marriage | <input type="checkbox"/> Both parties' date of birth |
| <input type="checkbox"/> Date of Separation | <input type="checkbox"/> Both parties' social security numbers |
| <input type="checkbox"/> Date of Divorce | <input type="checkbox"/> Both parties' postal mailing addresses |
| <input type="checkbox"/> Copy of Divorce Judgment & MSA ¹ | <input type="checkbox"/> Contact info (including E-mail) and bar numbers for involved counsel. |
| <input type="checkbox"/> Copy of Previous Orders re Plan | |
| <input type="checkbox"/> Date of past or intended retirement | |

Deadlines approaching? Specify:

If I am to bill/contact parties directly: home phone, work phone, cell phone and E-mail address

For nonemployee spouse, name relationship, postal mailing address, social security number and date of birth of beneficiary who is child of Participant (Employee or Retiree) for benefits in case of death (otherwise "Estate").

Signed "Pension Authorization".

A narrative of concerns and questions.

If not yet retired

If not yet retired, identity & contact info for employer under whom benefits are payable.

Latest annual statement of retirement benefits payable.

Description of prior military service that may provide additional credited service.

Description and correspondence re prior service credit reinstated or eligible for reinstatement by redeposit.

Special features in plan terms applicable to employee (e.g., air traffic controller)

If retired

Benefit statement showing how pension benefits were calculated on retirement and showing, e.g., survivor annuity chosen and what percentage.

Latest payment warrant or check stub.

**Please provide information via E-mail (docs scanned to pdf); fax; mail. Please use spaces to check off each item to insure that all available information & documents are forwarded. Piecemealing transmission tends to consume more time and result in higher attorney fees.*

Note re the **Federal Thrift Savings Plan**: Follow the items requested in the "What is Needed to Properly Complete ERISA QDRO" re account balance plans.

¹ Marital or property settlement agreement.