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**Information* Needed to Draft Domestic Relations Order
for California PERS & STRS Plans**

- Date of Marriage
 - Date of Separation
 - Date of Divorce
 - Copy of Dissolution Judgment / MSA¹
 - Copy of Joinder Documents re Plan
 - Copy of Previous Orders Affecting Plan
 - Date of retirement or intended retirement
 - Parties' dates of birth
 - Parties' social security numbers
 - Parties' postal mailing addresses
- Contact information (including E-mail and bar numbers) for involved counsel.
- 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 for benefits in case of death.
- Deadlines approaching?
- Signed "Pension Authorization".
- A narrative of concerns and questions.

If not yet retired

- If not yet retired, identify employer under whom benefits are payable.
- Latest annual statement of benefits payable.
- Description of prior public employment that may provide "reciprocity".
- Description and correspondence re prior service credit eligible for reinstatement or actually reinstated by redeposit.

PERS: *The employee can be of great help to us by finding out:*

- Is final compensation used for calculating the retirement benefit 12 or 36 months?
- Is unused sick leave included as credited service for benefit calculation?
- Is there a survivor continuance feature? If so, 25% or 50% or other?

If retired

- Benefit statement showing how retirement benefits were calculated on retirement and showing, e.g., Optional settlements chosen; calculation under varying formulas.
- Latest payment warrant or check stub.

Please send documents by E-mail (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.

¹ MSA = marital or property settlement agreement.