

# INTAKE CHECK LIST



01

## FILL OUT YOUR INTAKE FORM

Once we receive your full name and email address, we will email you a link to an online intake form. Please complete within one week.



02

## SEND YOUR MSA AND JDOM

- Marital Settlement Agreement
- Stamped Judgment of Dissolution of Marriage



03

## SEND PLAN DOCUMENTS

Remember to send recent plan statements, or other document that relates to your plan, like a summary plan description, letter or correspondence you may have from the plan.



04

## CHECK YOUR CLIENT PORTAL

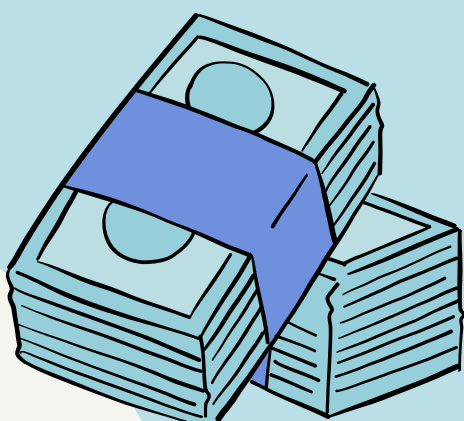
You will receive access to your Secure Client Portal. This is where you can upload any additional documents, and get updates.



05

## MAKE A PAYMENT

All outstanding balances must be paid before the drafting process begins. If we are acting as a neutral, and you've agreed to evenly share the costs with your ex, please pay half.



06

## NOW OFF TO DRAFTING

Now that you've given us everything we need, Anne can start drafting the QDRO(s).

