

OUR ELEVATED QDRO PROCESS

A quick guide



1. Intake

- complete your intake forms.
- submit all plan statements.
- submit all agreements/ relevant court documents.
- sign engagement agreement.
- submit payment.
- if we do not hear from you within 2 months from the initial emails, we will close the file and there may be fees to reengage.

3. Plan Pre-Approval

- draft sent to the Plan for review.
- review can take up to 90 days and may require participant involvement.
- review "denials" are customary and the corrections are included in your fees.

5. Signatures

- yay! the draft(s) have been approved by all involved.
- we will circulate a clean (no watermarks, no edits) version for you to sign via hello sign.
- these links expire so get these documents signed!

7. Final Approval

- our office prepares the DROs for final approval.
- we send a letter and the certified copy of the DRO to the Plan Administrator.
- we provide you a copy of this letter and tracking.
- within 90 days the Plan Administrator will contact you, usually by U.S. Mail.
- The administrator will also provide you with distribution paper work if you wish to rollover monies and statements regarding your benefits. If you do not receive these forms, call the number in the final approval letter to request them!

2. Drafting

- a drafter is assigned to your DRO.
- an Attorney reviews your plan and documents provided.
- occasionally, some one from our team will reach out for clarification or address potential issues.

4. Client/Counsel Review

- the plan has reviewed and has either approved or requested edits to be made to the draft.
- after Anne reviews, the draft is circulated to the parties and their attorneys (if requested for review.) Just say you approve and the DRO will move forward.

6. Court Entry

- we take your signed copies and submit them to the court as a neutral unless hired as your advocate.
- you will be copied in the email to the court. Judge signs the DRO and it is entered into the court record.
- we order the certified copy of the DRO.

8. All Done

- if we received a letter from the plan approving your DRO, we will close your file.
- if we did not receive communication from the plan, we may contact you for follow up and ask for a copy to close our file
- Thank you for trusting us with this complex process!

FOR MORE INFO OR MORE ABOUT OUR
PRACTICE IN GENERAL GO TO
ANNESCHMIDLAW.COM

*** THESE STEPS ARE FOR A "TYPICAL" DOMESTIC
RELATIONS ORDER, SITUATIONS AND YOUR CASE MAY
REQUIRE DIFFERENT STEPS