

# The Law Offices of Anne Schmidt, LLC

## Closing Your Matter



### 1. Certified Copy of QDRO is sent to Plan

- We will tell you how your certified QDRO(s) were sent to the Plan and share the mailing tracking numbers (if applicable)
- Allow the Plan 60 days to process your QDRO
- Be on the lookout for communications from the plan via US Mail. These communications should include distribution election forms to rollover or access your monies. We can be engaged to advise on these forms at hourly rates.\*

*\*please remember we are not financial advisors*

### 2. Your Responsibilities

- If you receive any communication from the plan, please send a scan or photo of the letter to our office.
- If 60 days have passed and you have not received an approval letter, please call the Plan for a status update (see your addendum for contact info.)

### 3. How our office can support

- Please allow up to 60 days for the plan to process and then reach out to them directly for a status update, first.
- If you have difficulty reaching the plan, contact our office for a courtesy assistance.
- Any assistance beyond the scope of QDRO processing is subject to hourly billing.



### 4. Closing Your Matter

- If we have not received notice from you or the plan, we will send you a courtesy email requesting confirmation that the transfer has been completed so we may close your matter with our office.
- If we don't hear from you within 7 days of this request, we will close our file.
- We appreciate you and wish you the best!

