



Civil | Eviction | Probate | Family Law | Real Estate

*(QDROs & DROs)*

## Participant Information

Name: \_\_\_\_\_  Defendant  Petitioner

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ D.O.B: \_\_\_\_\_

## Non-Participant Information

Name: \_\_\_\_\_  Defendant  Petitioner

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ D.O.B: \_\_\_\_\_

**Official Retirement Plan Name:** \_\_\_\_\_

Official Retirement Plan Address: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Date of Divorce: \_\_\_\_\_ Date of Division: \_\_\_\_\_

Additional Notes/Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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**There may be additional information needed if this is a pension or a plan with survivor benefits. We will reach out with additional questions depending on the detail of the Agreement and type of plan.**

Please enclose all of the following items and check the box to indicate that each enclosure is attached.

- Please enclose any correspondence with the plan provider including a recent statement.
- Please enclose a copy of the case caption (a copy of any legal document containing the names of the parties, the court, and the case number.)
- Please enclose a copy of the property settlement agreement or judgment, which details the retirement distribution terms.

**I, the undersigned, declare the following:**

It has been disclosed to the Customer that Inland Valley Doc Prep is owned and operated by document preparers that are prohibited by law from giving legal advice. The Customer acknowledges that the Preparer is prohibited by law from giving legal advice and shall hold Preparer harmless of the outcome of court rulings, hearings, and any motions filed against the Customer. The Customer understands that he or she is responsible for his or her legal decisions and declarations made by Preparer which is incorporated in the documents prepared by this Preparer. The Customer also acknowledges that Inland Valley Doc Prep does not represent Customer and that Customer must appear for himself/herself in all Court proceedings and hearings. The Client must take responsibility for Customer's actions and arguments. Inland Valley Doc Prep is responsible for meeting the proper statutes in relations to preparation of Customer's paperwork and pleadings, including formatting the documents properly.

- By checking this box and signing below, I agree with the above declaration.

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**Date**                                      **Print Name**                                      **Signature**