

**CHECKLIST FOR INFORMATION NEEDED TO PREPARE
QUALIFIED DOMESTIC RELATIONS ORDERS (“QDROs”)**

Presented By:

Linda Suzanne Griffin, J.D., LL.M., C.P.A.

Linda Suzanne Griffin, P.A.

1455 Court Street

Clearwater, Florida 33756

727.449.9800

May 17, 2000

QDRO CHECKLIST

- (1) Ascertain exact name of Plan(s) prior to drafting final judgment or settlement.
- (2) Ascertain which party will pay the attorney preparing the qualified domestic relations order (the “Preparing Attorney”) prior to signing the settlement.
- (3) Understand that the Preparing Attorney represents only one party.
- (4) Retainer must be paid to Preparing Attorney up front and the agreement between the parties is irrelevant to the Preparing Attorney.
- (5) Need copies of exact Plan documents; not the Summary Plan description. It is usually easiest for employee to get these documents.
- (6) Give Preparing Attorney the name and telephone number of Plan Administrator, and any applicable QDRO documents.
- (7) Retain jurisdiction if QDRO is not entered at same time as final judgment.
- (8) Do not tell clients that the QDRO will be received by a certain date because this depends upon how long a Company takes to review the document.
- (9) Negotiate, follow through, and obtain information before settlement is signed.

Obviously, this is not a discussion of the technical aspects of a QDRO. If help is needed with any of the substantive legal issues, then please contact me.