

Information and Documents Needed
QDRO Preparation

This form outlines the basic information and document we need to study and explain your retirement or employee benefits, to explain them to you, and to prepare a Qualified Domestic Relations Order reflecting your agreement. There could be additional information needed, but this information is needed in all cases.

1. Information. Please give the following information for employee and spouse:

| | Employee | Spouse |
|--|----------|--------|
| Full name | | |
| Daytime telephone number | | |
| Mailing address | | |
| Social Security number | | |
| Date of birth | | |
| Name(s) of retirement or employee benefit plans in which participant | | |
| Date of marriage | | |

2. Documents. For each retirement or employee benefit plan in which you are a participant, please provide the following documents, if available:

1. The Summary Plan Description
2. Your most recent Annual Benefits Statement
3. The plan's Written QDRO Procedures

3. Releases. Please sign a release for each plan for which you are a participant. These releases will enable us to obtain documents you do not have, as well as a copy of the full plan itself.

4. Questions/Problems. Please contact us if you have any questions or problems: Verner & Brumley, P.C., 3131 TurtleCreek Blvd., Penthouse Suite, Dallas, Texas 75219, 214.526.5234 (telephone), 214.526.0957 (facsimile), jverner@vernerbrumley.com.