

THE FLAT FEE 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.

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

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