

# PARTY INFORMATION WORKSHEET

***It is very important that you complete ALL the information requested in this Worksheet. Failure to do so may delay our ability to draft your Order(s).***

Emergency Case          Non-Emergency Case

Name of person who is providing information below \_\_\_\_\_

## Plaintiff's Information

Full Name \_\_\_\_\_

Gender \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Date of Birth \_\_\_\_\_

Soc. Security No. \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

## Defendant's Information

Full Name \_\_\_\_\_

Gender \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Date of Birth \_\_\_\_\_

Soc. Security No. \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

**Does Plaintiff intend to move to a different address in the next 60 days? Yes \_\_\_\_\_ No \_\_\_\_\_**

**Does Defendant intend to move to a different address in the next 60 days? Yes \_\_\_\_\_ No \_\_\_\_\_**

**Please indicate below whether the party is represented by counsel and, if so, provide the requested information.**

Plaintiff does \_\_\_\_ /does not \_\_\_\_ have an attorney

Defendant does \_\_\_\_ /does not \_\_\_\_ have an attorney

## Plaintiff's Attorney Information

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

## Defendant's Attorney Information

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

**Date of Marriage** \_\_\_\_\_

**Date the Judgment of Divorce or Separation was entered by the Court (signed by Judge)** \_\_\_\_\_

**Date the Complaint for Divorce or Separation was filed with the Court** \_\_\_\_\_

# **RETIREMENT PLAN INFORMATION WORKSHEET**

**\*\*PLEASE COMPLETE A SEPARATE WORKSHEET FOR EACH PLAN BEING DIVIDED\*\***

***It is very important that you complete ALL the information requested in this Worksheet. Failure to do so may delay our ability to draft your Order(s).***

Name of person who is providing information below \_\_\_\_\_

Plan Name (provide official name, if known) \_\_\_\_\_

Name of Employee (or former employee) \_\_\_\_\_

Name of Employer (or former employer) \_\_\_\_\_

Employer Contact Number \_\_\_\_\_

Employee Hire Date (if exact date unknown please indicate whether employee was hired prior to, or after, date of marriage and provide year of hire, if known) \_\_\_\_\_

Type of Employee            Hourly \_\_\_\_\_ Salaried \_\_\_\_\_

Employee Status            Active Employee \_\_\_\_\_  
Terminated but Not Retired \_\_\_\_\_ Termination Date \_\_\_\_\_  
Retired and Receiving Benefits \_\_\_\_\_ Retirement Date \_\_\_\_\_

Plan Type (check one)    \_\_\_\_\_ Defined Benefit (pension)  
                                         \_\_\_\_\_ Defined Contribution (401k, 403b, IRA, etc.) **\*\*SUBMIT RECENT ACCOUNT STATEMENT\*\***

If not clearly spelled out in the Judgment, provide the intended date on which the benefit awarded to the non-employee spouse (Alternate Payee) is to be calculated/divided (Division Date) \_\_\_\_\_

## **For Defined Benefit Plans only:**

*If not provided for in the Judgment and if allowed under the Plan, is the Alternate Payee to have the right to commence his or her assigned share of the benefit at any time the Plan allows (regardless whether Employee has retired)?*

Yes \_\_\_\_\_ No \_\_\_\_\_

## **For Defined Contribution Plans only:**

*If not specified in the Judgment, is the Alternate Payee's share of the Plan to be adjusted by investment gains and losses from the Division Date to the date the funds are distributed to the Alternate Payee? Yes \_\_\_\_\_ No \_\_\_\_\_*

*If the Judgment does not address loans against the account as of the Division Date and the Alternate Payee is to receive a percentage of the account (rather than dollar amount), how should the loan be treated in determining the portion of the account to be divided?*

\_\_\_\_\_ Include loans (larger amount being divided/loan does not impact Alternate Payee's share)

\_\_\_\_\_ Exclude loans (smaller amount being divided with Alternate Payee's share being reduced)

\_\_\_\_\_ There are no loans

Was there a balance in the account on the date of marriage? Yes \_\_\_\_\_ No \_\_\_\_\_ Unknown \_\_\_\_\_

**PLEASE EXPLAIN ANY TIME CONSTRAINTS, SPECIAL CIRCUMSTANCES OR OTHER ISSUES THAT APPLY TO THE DIVISION OF THIS RETIREMENT PLAN IN THE SPACE PROVIDED BELOW:**