

QDRO

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Social Security Request Form

- Spousal Joint Report: Social Security analysis for both husband and wife (Report sent to both attorneys) *See attached sample of analysis sheet.*
- Spousal Trial Report: Social Security analysis for both husband and wife (Report sent only to requesting attorney) *See attached sample of analysis sheet.*
- Traditional Social Security Report: for Husband Wife (Report sent only to requesting attorney) This does not include potential spousal or widow(er) benefits.

1. Requesting Attorney Information:

Name: _____
Address: _____

Phone: (____) _____
Fax: (____) _____
I represent: Husband Wife

- I am requesting a joint report and, by my signature, authorize QDRO Consultants to send reports and discuss issues with my opposing counsel listed below.

(requesting attorney signature)

2. Opposing Counsel, for Joint Report:

Name: _____
Address: _____

Phone: (____) _____
Fax: (____) _____

3. Husband Information:

Name: _____
Social Security Number: _____ - _____ - _____
Date of Birth: ____/____/____
Employment Status: Active Retired
Health Status: Healthy Disabled: Not Receiving SS Disabled: Receiving SS

- Rather than projecting earnings based on the last year listed on the Social Security Earnings Statement, please assume an annual salary of \$_____. (This option should be used when the SS statement does not accurately reflect the probable earnings level after the divorce)

4. Wife Information:

Name: _____
Social Security Number: _____ - _____ - _____
Date of Birth: ____/____/____
Employment Status: Active Retired
Health Status: Healthy Disabled: Not Receiving SS Disabled: Receiving SS

- Rather than projecting earnings based on the last year listed on the Social Security Earnings Statement, please assume an annual salary of \$_____. (This option should be used when the SS statement does not accurately reflect the probable earnings level after the divorce)

5. Additional Information:

Date of Marriage: ____/____/____
Last date of acquisition of marital assets: ____/____/____ (Current date will be used if not specified.)

Please also provide a copy of the most recent Social Security Earnings Statement for both parties.

SAMPLE

| Benefits | | | |
|----------|---|--------------------|-------------|
| | | John Smith | Mary Smith |
| 1 | Projected Benefit Based on Earned Wages (payable at age 62) | \$ 1,708.30 | \$ 127.60 |
| 2 | <i>Marital Portion of Projected Benefit</i> | \$ 1,365.54 | \$ 94.92 |
| 3 | Additional Spousal Benefit with Projection | | \$ 709.80 |
| 4 | Additional Widow(er) Benefit with Projection (at age 62) | | \$ 1,080.60 |
| 5 | Total | \$ 1,708.30 | * |
| 6 | Current Benefit Based on Earned Wages (payable at age 62) | \$ 1,610.40 | \$ 127.60 |
| 7 | <i>Marital Portion of Current Benefit</i> | \$ 1,554.88 | \$ 94.92 |
| 8 | Additional Spousal Benefit | | \$ 662.20 |
| 9 | Additional Widow(er) Benefit (at age 62) | | \$ 1,018.20 |
| 10 | Total | \$ 1,610.40 | * |

| Present Values | | | |
|----------------|---|----------------------|--------------|
| | | John Smith | Mary Smith |
| 11 | Marital Present Value of Projected Benefit (line 2) | \$ 171,604.36 | \$ 13,417.66 |
| 12 | Additional Spousal Present Value with Projection (line 3) | | \$ 99,221.92 |
| 13 | Additional Widow(er) Present Value with Projection (line 4) | | \$ 64,368.18 |
| 14 | Total | \$ 171,604.36 | * |
| 15 | Marital Present Value of Current Benefit (line 7) | \$ 195,410.28 | \$ 13,417.66 |
| 16 | Additional Spousal Present Value (line 8) | | \$ 92,567.99 |
| 17 | Additional Widow(er) Present Value (line 9) | | \$ 60,661.25 |
| 18 | Total | \$ 195,410.28 | * |

* The total for the Lower Wage Earner (LWE) can be different depending on the specifics of the case and what argument is presented. If the LWE remarries, the value is simply the earned benefit based on their own earnings (line 1,6,11, or 15). If the LWE does not remarry the value may also include the spousal benefit (line 3,8,12, or 16) and the widow(er) benefit (line 4,9,13, or 17).