

# Economic Horizons, Inc. Engagement Letter

## FOR PREPARATION OF A QUALIFIED DOMESTIC RELATIONS ORDER

14825 St. Mary's Lane, Ste 118

800 490-3030 or fax 281-556-5549

Houston, Texas 77079

williamhagen@sbcglobal.net

Attorney Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_ Fax: \_\_\_\_\_

This is my authorization for Economic Horizons, Inc. to prepare a Qualified Domestic Relations Order (QDRO) from the data I have provided. I understand that any alterations of this data must be in writing by me. Additionally, should I choose to alter the pre-approved, finished work product of Economic Horizons, Inc. I do so knowing those changes may cause the QDRO to be rejected by the plan administrator and subject to further expense to correct.

**Pre-approval by the plan administrator of the QDRO is provided as part of this service, if plan allows.**

QDRO's will be written indicating benefits only as provided by the divorce decree or with an affidavit from you, the authorizing attorney. At no time do we communicate with opposing counsel or either party.

Attorney Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\*\* Which party do you represent? Participant Alternate payee (circle one)

### PLEASE NOTE:

We must receive (1) a copy of the first page of the divorce decree (for style, case no. & correct names), (2) a copy of the pages that actually indicate how the benefits are to be divided, (3) the last page of the decree showing attorneys and all pertinent information related to them and (4) a check for \$ 400.00. Please do not provide the decree in its entirety. If you have a plan statement, (401k plans please enclose a copy.)

**IT IS THE POLICY OF ECONOMIC HORIZONS, INC. THAT PAYMENT IS MADE BY THE ATTORNEY OR THE CLIENT PRIOR TO COMMENCEMENT OF WORK. NO QDRO WILL BE RELEASED UNDER ANY CIRCUMSTANCES BEFORE PAYMENT IS MADE AND WILL ONLY BE RELEASED TO AUTHORIZING ATTORNEY. PLEASE FILL IN ALL INFORMATION BELOW:**

**Plan Participant:** \_\_\_\_\_ SSN: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Date of Birth: \_\_\_/\_\_\_/\_\_\_ Date of Marriage: \_\_\_/\_\_\_/\_\_\_ Date of Divorce: \_\_\_/\_\_\_/\_\_\_

**Alternate Payee:** \_\_\_\_\_ SSN: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Date of Birth: \_\_\_/\_\_\_/\_\_\_

**Is the plan participate in pay status currently: YES NO**

If the plan is a 401k, how do you wish the loan balance (if any) to be addressed? \_\_\_\_\_

Divide balance in plan only  Ignore loan  add loan amount to balance of plan  
A file copy will be provided for you along with the QDRO to be filed with the court.

### FILL IN AS MUCH AS POSSIBLE BELOW:

Name of employer:

Name of plan:

Administrators name:

Phone #: