

# Moon, Schwartz & Madden

## QDRO and Valuation Consultants

3478 Buskirk Avenue, Suite 1000 • Pleasant Hill CA 94523 • (925) 258-7100

---

Eric J. Moon (retired)  
Matthew H. Schwartz  
John C. Madden

Fax (925) 258-3969  
[www.msmqdros.com](http://www.msmqdros.com)

### **INSTRUCTIONS FOR FILING/PROCESSING JOINDER**

1. Review and sign the Request for Joinder of Employee Pension Benefit Plan and Order (Family Law) (FL-372).
2. Review the Summons (Joinder) (FL-375).
3. Review and sign the Pleading on Joinder - Employee Benefit Plan (FL-370).
4. If no changes to the above make 2 copies of all of the forms<sup>1</sup>.
5. File the original and 2 copies of each document.
6. Follow the directions below for service on the plan.

### **INFORMATION FOR SERVICE OF PROCESS ON THE PLAN**

1. You may not serve your own documents. Someone who is over 18 years old and not a party to the case must serve the documents for you and complete the Proof of Service of Summons (Joinder) on the back of the Summons (Joinder) (FL-375.)
2. Include two copies of the Notice and Acknowledgement of Receipt (FL-117) so the plan can accept service of the documents **by mail**. The person who serves the documents on the plan signs the Notice and Acknowledgement of Receipt.
3. The person who serves the documents mails a copy of each of the following filed forms to the plan at the **address listed on pg. 2** of the Summons:
  - Request for Joinder of Employee Benefit Plan and Order (FL-372)
  - Pleading on Joinder – Employee Benefit Plan (FL-370)
  - Notice of Appearance and Response of Employee Benefit Plan (FL-374) – serve a **BLANK** copy
  - Copy of Summons (Joinder) (FL-375). The person who mails the documents to the Plan must complete Proof of Service of Summons (Joinder) on page 2 of the Summons (Joinder) (FL-375) and include a copy in the packet of forms to be served on the plan. Do not serve the original Summons on the plan.
  - Notice and Acknowledgement of Receipt (FL-117) (**two copies**).
  - Self-addressed return envelope, postage prepaid.
4. After the documents are mailed and the Plan mails you their signed Notice and Acknowledgement of Receipt in the envelope provided, you may then file the original Summons (Joinder) (FL-375).

---

<sup>1</sup> Copies are only required for cases that are filed in person with the court. If the court requires on-line filing, it is not necessary to make copies prior to filing.