

**SELF REPRESENTED CLIENT POLICY**  
*(in Propria Persona)*

As a Self Represented client you understand the following:

- Moon, Schwartz & Madden (MSM) is a valuation-consulting firm that assists clients in determining and dividing the community property interest in all types of retirement plans.
- MSM is not a law firm, and therefore cannot give legal advice of any kind to clients. The courts consider us to be qualified as experts in the valuation and division of all types of retirement benefits.
- It is your responsibility to work with the opposing party in gathering any and all information and/or documentation required to complete the division of community property. MSM must be provided with all documents necessary to complete the requested order.
- All required documents should be mailed or emailed (preferred) to MSM. Please send copies, as originals will not be returned.
- MSM is not responsible for filing any documents with the court or the plan administrator on your behalf.
- In order to have your file entered into our system, you must provide a completed intake form, a copy of your Marriage Settlement Agreement or Judgment of Dissolution of Marriage (only the section pertaining to the division of the plans), and a signed copy of this form (from any party that is self represented). Once MSM has received a completed intake form, an initial estimate of charges will be provided.
- Work will only begin once MSM has received full payment by credit card, check or money order (make sure money orders include your first and last name). Payment for Fast Track cases must be paid either by Credit Card, Cashier Check, or Money Order.
- After initial contact, any request for status updates must be submitted via email. This includes inquiries about received payments, status of QDRO preparation or any other request for information.
- If MSM is retained as a joint expert, per Family Code 216, both parties must be included in all communication with our office.
- MSM does not disburse funds. The plan administrator will do the transfer of funds once they have been provided with a certified copy of the QDRO. Our office cannot speculate as to the time frame of disbursement since we are not involved in that aspect of the case.
- MSM reserves the right to require parties be represented by attorneys.
- Your signature declares that in the eyes of the court, you are self-represented. If at any time, you retain counsel you must notify our office immediately.

By signing this page, you agree to the following guidelines and rules for Self Represented Clients:

\_\_\_\_\_  
Petitioner

\_\_\_\_\_  
Date

\_\_\_\_\_  
Respondent

\_\_\_\_\_  
Date