

INSTRUCTIONS FOR SELF REPRESENTED PARTIES

Upon receiving the proposed Qualified Domestic Relations Order (QDRO) and cover letter from Moon, Schwartz & Madden (MSM):

- Please review all documents for accuracy and notify MSM of any change in your mailing address.
- As indicated in your signed Self Represented Form provided to MSM at the outset of your case, we do not assist in obtaining signatures, filing with the court nor serving on the plan administrator. You must take these necessary steps to complete the process in order to ensure the awarded funds will be payable by the retirement plan.
- You must both sign the order in the presence of a notary since you are not represented by an attorney. After both of you have signed, you should call the clerk of the court for instructions on obtaining the judge's signature. After the judge has signed the order, you should send a certified copy to the plan and it will then go into effect. Unless a revision is required to the (Q)DRO, the document should not be returned to MSM.
- When you eventually submit a certified copy of the order to the plan, you will need to provide them with your social security numbers and dates of birth in writing, at the time you submit the executed order. Due to the problem of potential identity theft, we no longer put them in the order.
- MSM does not disburse funds. The plan administrator will initiate the transfer of funds once they have been provided with a certified copy of the QDRO. Please contact the plan directly as to the timing of any disbursement of funds.
- Visit <https://selfhelp.courts.ca.gov/> for more information on obtaining a court order and the steps necessary to file the QDRO.
- Visit <https://selfhelp.courts.ca.gov/self-help/find-self-help> to locate your local Self-Help Center in your area.
- MSM is not a law firm and therefore cannot give legal advice of any kind.