

# GRAY JAY

## ENDEAVORS LLC

### INTAKE FORM & AGREEMENT

#### FOR PREPARATION OF RETIREMENT DIVISION ORDERS (QDROs & DROs)

**Please Complete:** Choose one:  Plaintiff/Petitioner A  Defendant/Respondent/Petitioner B

First Party's Name: \_\_\_\_\_ Email: \_\_\_\_\_

Pronouns: \_\_\_\_\_ (Don't know why we are asking? [Click here.](#))

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Street City State Zip Code

Attorney's Name: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Street City State Zip Code

#### Second Party's Information:

Choose one:  Plaintiff / Petitioner A  Defendant / Respondent / Petitioner B

Relationship to First Party:  Former Spouse  Spouse  Child

Second Party's Name: \_\_\_\_\_ Email: \_\_\_\_\_

Pronouns: \_\_\_\_\_ (Don't know why we are asking? [Click here.](#))

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Street City State Zip Code

Attorney's Name: \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Street City State Zip Code

**Mediator's Name:** \_\_\_\_\_ Email: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Street City State Zip Code

Learn more at [GrayJayQDROs.com](http://GrayJayQDROs.com)

QDRO Preparation, Retirement Addendum Drafting, and Retirement Division Consultations





Referred by:  Internet Search  Referral from Attorney or Mediator  
 Referral from Vesta  Other: \_\_\_\_\_

Once you have submitted this form we will send you an Invoice from Stripe. Send Invoice to:

Choose one:  Plaintiff / Petitioner A  Defendant / Respondent / Petitioner B  
 Split Equally between both parties  Split Other: \_\_\_\_\_

The undersigned customer(s) are requesting specific forms services from Gray Jay Endeavors, LLC (“Gray Jay”) as described above only. The customer(s) intend to retain control over all aspects of their cases and be responsible for all decisions made in the course of their case. The customer(s) acknowledge that the requested services are not a legal service and Gray Jay is not a law firm. If customer(s) need legal advice they are directed to consult with their own individual attorney.

Customer(s) acknowledge that Gray Jay maintains a paperless office and as such uses various Internet-based cloud-computing services for various purposes, including storing, backing-up, and sharing documents (including confidential and privileged documents), tracking time and tasks for projects, managing contact information, and sending electronic communications. Customer(s) give express, informed consent for Gray Jay to use cloud computing in connection with this matter.

This written Agreement governs the entire relationship between Customer(s) and Gray Jay. All amendments shall be in writing and attached to this agreement. Signature by fax or electronic device digital signature is expressly authorized and shall have the same force and effect under this Agreement.

I have carefully read this Agreement and believe that I understand all of its provisions.

by: \_\_\_\_\_

by: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Name: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

(If both parties are hiring Gray Jay jointly, then both should sign this document.)

Upon Completion you can submit this form to us:

via e-mail to: [jkelsey@grayjayendeavors.com](mailto:jkelsey@grayjayendeavors.com)

or by fax to: 508.655.5981

or by mail to: Gray Jay Endeavors, LLC, 9 Main St., Southborough, MA 01772.

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