

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

QDRO Preparation, Retirement Addendum Drafting, and Retirement Division Consultations



Retirement Plan Information - Based on your answers we will send you additional questionnaire(s) and document requests specific to the type of account(s) you need divided:

How many retirement accounts need to be divided? _____
Please provide the full official name of each Plan that needs to be divided and the account type:

Plan Name:	Plan Type:	401(k) 403(b)	Pension	IRA	Unknown or Unsure
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add additional page if you need more space.

Please choose which services you would like completed (check all that apply):

- Basic - Preparation of Order (QDRO or DRO) & Preapproval.** Does not include any additional documents or assistance with court filings. *If you choose only some of the options, then you will be responsible for any below described additional services not checked.* Choosing only this option is best if you are working with attorneys who will walk you through the additional steps. \$750.00
- Additional service: Offset Calculations.** If checked, we will perform the offset calculation necessary to reduce the number of QDROs. + \$250.00
- Additional service: Assistance with Request to Court and Submission of Final Order** (Massachusetts only) Once the order is pre-approved our office will assist with obtaining everyone's signatures, assist with submitting the documents to the court for the Judge's signature, and then submit the document to the plan administrator for implementation. This option is charged for the first Order only. + \$250.00

Additional Plans: # of Additional Plans ____ x \$750 per Basic Preparation + \$ ____

of Additional Services ____ x \$250 per Service + \$ ____

Promotional Code: _____ (if any) TOTAL = \$ ____

- Referred by: Internet Search Referral from Attorney or Mediator
 Referral from Vesta Other: _____

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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 Justin Kelsey, owner of Gray Jay Endeavors, LLC, also works with Skylark Law & Mediation, PC. Any services provided by Skylark Law & Mediation, PC or Justin Kelsey, outside of the services requested here, may create an actual or perceived conflict of interest. By signing this Agreement, customer(s) agree to waive any actual or perceived conflict. 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

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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