



www.pensionappraisers.com
www.qdrodesk.com

SAMPLE ABRIDGED VERSION OF MONEY PURCHASE SETTLEMENT AGREEMENT LANGUAGE

Retirement Benefits of Plaintiff

Plaintiff is a Participant under the [Insert Exact Name of Plan] (hereinafter referred to as Plan). Through a Qualified Domestic Relations Order "QDRO", Defendant is hereby granted a portion of the Plaintiff's retirement benefits under the Plan as specified below.

Amount of Defendant's Benefit: The Defendant will be assigned an amount equal to [Insert % Amount] Percent of the Plaintiff's Total Account Balance accumulated under the Plan from [insert the Date the Plaintiff started participating in the Plan] to [insert the Marriage End Date] PLUS [Insert \$ Amount].

INVESTMENT EARNINGS

Investment Earnings: The Defendant's assigned share of the benefits as set forth above SHALL [insert either ALSO or NOT] bear any interest and investment earnings or losses attributable thereon for periods subsequent to the "Assignment Date," or the closest Plan valuation date thereto, until the date the Plan actually establishes a separate account(s) for the Defendant (the "Segregation Date").

PLAN ADMINISTRATOR FEES

Plan Administrator Fees: Any QDRO processing or reviewing fees charged by the Plan Administrator shall be deducted equally from Defendant's and Plaintiff's share of the retirement benefits.

PROCESSING QDRO

Processing The Qualified Domestic Relations Order: Defendant's Attorney will be responsible of preparing, submitting and overseeing the approval of the QDRO until its final acceptance by the plan administrator as a QDRO. It is understood that Defendant's Attorney may employ a QDRO drafting company to assist in the preparation and submission of the Order to the plan administrator for approval as a QDRO.