

Order Drafting Services

Service	More Info	Fee
QDRO	<i>We review the Decree and plan documents then draft an Order that is customized to the case. In the event that the Entry is vague or silent, we will require instruction from the requesting attorney.</i>	\$400
Discovery for QDRO Requests	<i>We can request the necessary plan information from the employer when provided with a plan name, contact information and a limited authorization.</i>	\$100/plan
Complex Plans Upcharge	<i>Preparation of QDROs for some plans require a significant amount of additional time and skill. We will contact you when this charge applies.</i>	\$100/plan
Pre-approval	<i>We submit a draft to the plan administrator so that you are assured of a quick approval once the Order is executed.</i>	\$100/plan
QDRO for Fidelity Defined Contribution Plan	<i>This service is designed to incur a lower Fidelity review fee and expedite the approval of the order. We also provide specific recommendations to fully protect the parties in the event that there is a deficiency in the plan's QDRO guidelines.</i>	\$500
IRA Letters of Instruction	<i>Most IRAs don't require QDROs. This letter provides the administrator with the necessary division instructions.</i>	\$200
Federal (COAP) and State (DOPO) Orders	<i>These QDRO-like orders divide Civil Service Retirement System (CSRS), Federal Employees Retirement System (FERS), Thrift Savings Plan (TSP), and each of the state pension plans in Ohio (OPERS, STRS, SERS, OP&F, HPRS)</i>	\$400
Military Order	<i>Military Qualifying Court Order for any of the branches of the US Military.</i>	\$500
Update Order	<i>Change provisions of previously drafted Order which has not been rejected</i>	\$200

****Please note that there is a discount when requesting multiple orders on the same case.*

Present Value Services

Service	More Info	Fee
Traditional Present Value	<i>Provides the current lump sum value of the accrued pension at the normal retirement age. This service includes discovery.</i>	\$250
Present Value of Government Plans	<i>Including Civil Service, FERS, Military, Railroad, Social Security and State pension plans</i>	\$250
Multi-Employer Union Plans	<i>For any plan that requires a special calculation of coverture because of non-uniform benefit formula accruals</i>	\$300
Cash Balance Plans	<i>Includes tracing of marital and separate property in the accrual of the account as well as present value of current benefit equivalent (when plans will supply information)</i>	\$350
Update Report – Up to one year	<i>To recalculate present value based on new dates or assumptions (usually no discovery is necessary)</i>	½ Fee
Update Report – Over one year	<i>To recalculate present value based on new dates or assumptions and current accrued benefit (new discovery is included)</i>	Full Fee
Passive Growth Analysis on Defined Contribution Plans	<i>Tracing the passive growth of separate property brought into defined contribution plans. Please note: For complex plans that will take longer than usual, we will contact you with an additional cost estimate.</i>	Starts at \$600

Additional Present Value Services

Service	More Info	Fee
Deferred Retirement Option Plan (DROP) Analysis	<i>Calculation of an alternate payee's portion of a DROP account given at monthly intervals assuming the member terminates sometime between the current date and the member's Maximum DROP date</i>	\$350
Excess Survivorship	<i>For retired participants who elected a Joint and Survivor Annuity percentage larger than required by law or indicated by marital coverture</i>	\$300
Lost Survivorship	<i>For former spouses of a retired participant who were not elected for the survivorship awarded by the court</i>	\$500
Additional Date / Multiple Assumptions	<i>When you need one report with two different dates for the end of the marriage or when you need multiple values based on health assumptions or disability options</i>	\$100
Review Opposing Expert Report - Written	<i>We compare and contrast our report with one from another expert and critique any assumptions that we deem inappropriate.</i>	\$200 + report fee

General Services

Service	More Info	Fee
Negotiation and Settlement Help	<i>Set up a time to discuss your case by phone or in person. We'll review the retirement assets and recommend a solution.</i>	\$150/hour
Legal Services	<i>Legal and plan research, customized settlement agreement language, reviewing proposed documents and other specialized services from our ERISA attorney.</i>	\$200/hour
Expert Testimony In Office	<i>Where the court permits, we can provide testimony from our office. Fee includes preparation and testimony time. *</i>	\$750
Expert Testimony at Court	<i>All-inclusive preparation, travel (within Ohio), and appearance fee for expert witness on present value or QDRO issues. Date must be requested and retainer must be received in advance before witness can be guaranteed. *</i>	\$1500
Expedite – Next Day	<i>Additional fee beyond regular cost of service</i>	\$200/item
Expedite – 3 Business Days	<i>Additional fee beyond regular cost of service</i>	\$100/item

**An additional fee of \$250 may be charged for short notice, at the discretion of the expert. [Click here](#) for more information and forms to order testimony.*