

QDRO Split Request Form

STEP 1 PARTICIPANT INFORMATION

 First Name Last Name MI Social Security Number

 Plan Name

STEP 2 ALTERNATE PAYEE SETUP INFORMATION

 First Name Last Name MI Social Security Number

 Street Address City State Zip Code

- -
 Date of Birth (month | day | year)

Male Female

STEP 3 FEE INFORMATION

TPA Fee Amount: \$ _____

N/A - Plan Sponsor will pay fee directly to TPA
 Liquidate from Participant Only
 Liquidate from Alternate Payee Only
 Fee Split: \$/% _____ for Participant and \$/% _____ for Alternate Payee

STEP 4 AMOUNT TO BE LIQUIDATED

The liquidated amounts will be pulled pro rata from all sources. Aspire will NOT consider outstanding loan balances to be a part of a Participant's account balance when processing a split that calls for liquidation of a percentage of a Participant's account balance.

- OPTION A:** Liquidate a Specific Dollar Amount (\$ _____) Pro Rata from all vested investments in the Participant's account.
- OPTION B:** Liquidate a Specific Percentage (_____ %) of the Participant's vested account balance Pro Rata from all vested investments in the Participant's account.
- OPTION C:** Liquidate a Specific Dollar Amount from Specific Investments in the Participant's account:

INVESTMENT NAME	TICKER	DOLLAR AMOUNT TO BE LIQUIDATED
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

E-mail completed forms to your Business Relationship Consultant. **Questions?** Contact your Business Relationship Consultant. If you are unsure who your Business Relationship Consultant is, please e-mail info@aspireonline.com or call Aspire's Client Services Department at 866.634.5873.

OPTION D: Liquidate a Specific Percentage from Specific Investments in the Participant's accounts:

<u>INVESTMENT NAME</u>	<u>TICKER</u>	<u>PERCENTAGE OF VESTED BALANCE TO BE LIQUIDATED</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

STEP 5 INVESTMENT OF LIQUIDATED AMOUNTS

- OPTION A:** Liquidated amounts should be invested in the Alternate Payee's account in the same investments which were liquidated from the Participant's account.
- OPTION B:** Liquidated amounts should be invested in the Alternate Payee's account as shown below. Please note that amounts can only be invested in investment options allowed under the applicable retirement plan.

<u>INVESTMENT NAME</u>	<u>TICKER</u>	<u>% OF TOTAL AWARD</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Must total 100%

STEP 6 DISTRIBUTION FORMS (to be processed after QDRO Split is completed)

Optional Forms (check all that apply):

- No distribution forms have been provided to Plan Sponsor at this time
- Completed Participant distribution form is attached/enclosed
- Completed Alternate Payee distribution form is attached/enclosed

By signing this form, you are acknowledging that the accounts should be split as detailed above. Your signature is not authorizing any activity with respect to further distribution of either account, which must be authorized on the applicable distribution form or through the online distribution process (if applicable).

▶

TPA/Plan Sponsor Signature

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Date (month | day | year)

Signer's Printed Name

Title

TPA/Plan Sponsor Name

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