

December 1, 2021

RE: Message From our President: Fee Increase 2022

Our Valued Clients:

I want to thank all of you for your business over the past 36 years and express that we are eager to serve you for the decades to come. As you may notice by my signature line, I am now the President of QDRO Group, LLC. Fear not, Dave Kelley, our founder and a principal at QDRO Group, will still be working with us for years to come.

In addition to changing leadership, we have been busy making other changes. As you may have noticed, we have launched a new website. Further, our ordering portal has undergone some change, with many more changes to come to make it a smoother experience. We have also added new staff; we have purchased the book of business from LawDATA, a company that performed similar business as us in Florida; and we are currently working on another deal with a company in Pennsylvania (stay tuned for more information).

With all of these exciting changes, we also have to address a change that is not so exciting, we need to raise our fees. To put this in context, 20 years ago, you could order two QDROs from our company and pay \$700 (\$350 per QDRO). Today, you could still order two QDROs and pay \$700 (\$400 for the first QDRO and \$300 for the second). We were able to keep our prices so low by continually innovating and becoming far more efficient. We have now reached a point where our prices must increase.

In order to give you time to adjust, the price increases will take place **February 1, 2021**. Please see the new fee schedule at the end of this letter to see how each service is increasing in price.

If you have any concerns, please do not hesitate to contact me at (330) 721-6009.

Sincerely,



James R. Myers, Jr., Esq.
President/Lead Attorney
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Order Drafting Services

Service	More Info	Fee
QDRO or Other Non-Military Division Order	<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>	\$500
IRA Letter of Instruction	<i>Most IRAs don't require QDROs. This letter provides the administrator with the necessary division instructions.</i>	\$300
Military Order	<i>Military Qualifying Court Order for any of the branches of the US Military.</i>	\$600
Update Order	<i>Change provisions of previously drafted Order which has not been rejected</i>	\$250
Offset Calculations	<i>An offset of two or more plans starts at \$200. We will charge more based on the number of plans involved/complexity of the calculation. We may waive the fee if we performed a passive growth or other valuation.</i>	Starts at \$200

Discounts

Anytime you request the preparation of multiple division orders in the same case we will discount the second and any subsequent orders by \$200. For instance, if you need both a defined benefit and defined contribution QDRO in the same case, the total fee will be \$800 (\$500 for the first and \$300 for the second). **In order to receive this discount, all same case QDRO requests must be submitted at the same time.** Same case QDRO requests individually completed and submitted with payment will not receive the discount. **We do not offer a discount on any other services including valuations. There is no discount on Letters of Instructions.**

Valuation Services

Service	More Info	Fee
Present Value	<i>Provides the current lump sum value of the accrued pension at the normal retirement age. This service includes discovery.</i>	\$300
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
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>	\$400
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>	\$400
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>	Contact us for additional charges

General Services

Service	More Info	Fee
Consultations/Catch-All Help	<i>Set up a time to discuss your case by phone or in person. We'll discuss your issues, come up with a plan, and help you implement that plan.</i>	\$300/hour
Expert Testimony	<i>Our Per Diem Rate is \$1,000 for expert testimony, with a one day minimum. In addition to the time spent testifying, this rate will be charged for preparation time and travel expenses. We will discuss the case and provide a quote on the fees for testimony.</i>	Starts at \$1,000; Contact us for a free quote
Expedite – Next Day	<i>Additional fee beyond regular cost of service</i>	\$400/item
Expedite – 3 Business Days	<i>Additional fee beyond regular cost of service</i>	\$200/item