

April 4, 2024

**RE: Message From our President: Fee Increase 2024**

Our Valued Clients:

I want to thank all of you for your business. We love serving you and look forward to continuing to serve you for decades to come. Please let me take a moment to express our appreciation and advise you of some upcoming changes.

We are improving our online ordering portal. The redesign will allow for quicker and easier ordering. It will also allow you to see the status of the requested work and securely download the finished product. We expect this portal to launch at the end of the year or early 2025.

We continue to expand. We have entered into a partnership with Pension Analysis Consultants located in Pennsylvania. Through that partnership, we are now serving several additional states.

Along with these changes, we must also announce a slight price increase. Most notably, the discount on multiple QDRO orders will now be \$100 instead of \$200. After the price change, if you order two QDROs for the same case, the first will be \$500 and the second will be \$400.

These prices are effective **May 1, 2024**. The new fee schedule is attached.

If you have any concerns, please do not hesitate to contact me at (330) 721-6004.

Sincerely,



James R. Myers, Jr., Esq.  
President/Staff Attorney  
[jmyers@qdrogroup.com](mailto:jmyers@qdrogroup.com)

## Order Drafting Services

Service	More Info	Fee
<b>QDRO or Other Non-Military Division Order</b>	<i>We review the Decree and plan documents and draft an Order that is customized to the case. When the Entry is vague or silent, we will require instruction from the requesting attorney.</i>	\$500
<b>IRA Letter of Instruction</b>	<i>Most IRAs don't require QDROs. This letter provides the administrator with the necessary division instructions.</i>	\$300
<b>Military Order</b>	<i>Military Qualifying Court Order for any of the branches of the US Military.</i>	\$700
<b>Update Order</b>	<i>Change provisions of a previously drafted Order which has not been rejected.</i>	\$250
<b>Offset Calculations</b>	<i>An offset of two or more plans starts at \$300. We may charge more based on the number of plans involved or the complexity of the calculation. We may waive the fee if we performed a passive growth analysis or other valuation.</i>	Starts at \$300

## Discounts

When you request the preparation of multiple division orders in the same case, we will discount the second and any subsequent orders by \$100. For example, if you need both a defined benefit and defined contribution QDRO in the same case, the total fee will be \$900 (\$500 for the first and \$400 for the second). **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, and there is no discount on Letters of Instructions.**

## Valuation Services

Service	More Info	Fee
<b>Present Value</b>	<i>Provides the current lump sum value of the accrued pension at the normal retirement age. This service includes discovery.</i>	\$350
<b>Passive Growth Analysis on Defined Contribution Plans</b>	<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 \$750
<b>Deferred Retirement Option Plan (DROP) Analysis</b>	<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
<b>Excess Survivorship</b>	<i>For retired participants who elected a Joint and Survivor Annuity percentage larger than required by law or indicated by marital coverture.</i>	\$400
<b>Lost Survivorship</b>	<i>For former spouses of a retired participant who were not elected for the survivorship awarded by the court.</i>	\$500
<b>Additional Date / Multiple Assumptions</b>	<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
<b>Equalization/Stream of Income Report</b>	<i>Analyzes the multiple streams of income of each party to determine an equalization strategy.</i>	\$400

## General Services

Service	More Info	Fee
<b>Consultations/Catch-All Help</b>	<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>	\$400/hour
<b>Expert Testimony</b>	<i>Our Per Diem Rate is \$1,500 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 \$1,500; Contact us for a free quote
<b>Expedite – Next Business Day</b>	<i>Additional fee beyond regular cost of service.</i>	\$400/item
<b>Expedite – 3 Business Days</b>	<i>Additional fee beyond regular cost of service.</i>	\$200/item