

# Moon, Schwartz & Madden

## QDRO and Valuation Consultants

3333 Vincent Road, Suite 260 • Pleasant Hill CA 94523 • (925) 258-7100  
17901 Von Karman Avenue, Suite 600 • Irvine CA 92614 • (714) 430-8984

Eric J. Moon (retired)  
Matthew H. Schwartz  
John C. Madden

Fax (925) 258-3969  
[www.msmqdros.com](http://www.msmqdros.com)

### **INSTRUCTIONS FOR FILING/PROCESSING JOINDER**

1. Review and sign the Request for Joinder of Employee Pension Benefit Plan and Order (Family Law) (FL-372).
2. Review the Summons (Joinder) (FL-375).
3. Review and sign the Pleading on Joinder - Employee Benefit Plan (FL-370).
4. If no changes to the above make 2 copies of all of the forms.
5. File the original and 2 copies of each document.
6. Follow the directions below for service on the plan.

### **INFORMATION FOR SERVICE OF PROCESS ON THE PLAN**

1. You may not serve your own documents. Someone who is over 18 years old and not a party to the case must serve the documents for you and complete the Proof of Service of Summons (Joinder) on the back of the Summons (Joinder) (FL-375.)
2. Include a Notice and Acknowledgement of Receipt –Civil (POS-015) so the plan can accept service of the documents **by mail**. The person who serves the documents on the plan signs the Notice and Acknowledgement of Receipt.
3. The person who serves the documents mails a copy of each of the following filed forms to the plan:
  - Request for Joinder of Employee Benefit Plan and Order (FL-372)
  - Pleading on Joinder – Employee Benefit Plan (FL-370)
  - Notice of Appearance and Response of Employee Benefit Plan (FL-374) – serve a **BLANK** copy
  - Copy of Summons (Joinder) (FL-375). The person who mails the documents to the Plan must complete Proof of Service of Summons (Joinder) on page 2 of the Summons (Joinder) (FL-375) and include a copy in the packet of forms to be served on the plan. Do not serve the original Summons on the plan.
  - Notice and Acknowledgement of Receipt –Civil (POS-015)
4. After the documents are mailed, file the original Summons (Joinder) (FL-375).