

Instructions for QILDRO Calculation Court Order

*Please follow these instructions for completing the
QILDRO Calculation Order form.
Do not alter the form. Doing so will invalidate the order.*

This form is required only if the QILDRO requires payment of any benefit to be calculated using the marital portion benefit calculation formula or a percentage of gross benefit.

Heading:

- Enter the court's judicial district and county.
- The issuing court must be an Illinois court.
- Enter the parties' names
- Enter the case number

Section 2:

- Enter the name, mailing address and social security number of the member and of the alternate payee.

Please note: The Social Security Number of the alternate payee must be provided on copies submitted to CTPF.

Section 3 and 4:

If the court orders this benefit in the QILDRO	... then the following subsection of the QILDRO Calculation Order must be completed	
QILDRO Section:	Section 3 - % of Marital Portion	Section 4 - % of Gross Benefit
III - Monthly Annuity	3a	4a
V - Full Refund	3b	4b
VI - Partial Refund	3c	4c
VII - Death Benefit	3d	4d

Signature Lines: The QILDRO Calculation Order must be signed and dated by the issuing judge, and signed by the member and the alternate payee.

IN THE COURT OF THE _____ JUDICIAL DISTRICT

COUNTY, ILLNOIS.

)
) No:
)

QILDRO CALCULATION COURT ORDER

THIS CAUSE coming before the Court for the purpose of the entry of a QILDRO Calculation Court Order under the provisions of Section 1-119 of the Illinois Pension Code (40 ILCS 5/1-119), the Court having jurisdiction over the parties and the subject matter hereof; the Court finding that a QILDRO has previously been entered in this matter, that the QILDRO has been received and accepted by the Retirement System, and that the QILDRO requires percentage calculations to allocate the alternate payee's share of the member's benefit or refund, the Court not having found that the QILDRO has become void or invalid, and the Court being fully advised;

IT IS HEREBY ORDERD AS FOLLOWS:

- (1) The definitions and other provisions of Section 1-119 of the Illinois Pension Code [40 ILCS 5/1-119] are adopted by reference and made a part of this Order:
- (2) Identification of Retirement System and parties:

Retirement System: Public School Teachers' Pension and Retirement Fund of Chicago
203 North LaSalle, Chicago, Illinois 60601-1210

Member:

(Name)

(Mailing Address)

(Social Security Number must be provided on copy submitted to CTPF)

Alternate Payee:

(Name)

(Mailing Address)

(Social Security Number must be provided on copy submitted to CTPF)

The alternate payee is the member's (Check one):

- Current or former spouse Child or other dependant

(3) **Percentage of Marital Portion.** The following shall apply if and only if the QILDRO allocates benefits to the alternate payee in the specific Section noted. The Retirement System shall pay the amounts as directed below, but only if and when the benefits are payable pursuant to the QILDRO and Section 1-119 of the Illinois Pension Code (40 ILCS 5/1-119). Parties shall see QILDRO Section IX for the definitions of A, B, C and D as used below.

(a) The alternate payee's benefit pursuant to QILDRO Section III(A)(2) (**monthly retirement benefit**) shall be calculated pursuant to Section IX of the QILDRO and paid as follows:

$$\left(\frac{\text{(Enter A)}}{\text{(Enter B)}} \right) \times \text{(Enter C)} \times \text{(Enter D)} = \text{(Monthly Amount)}$$

(b) The alternate payee's benefit pursuant to QILDRO Section V(A)(2) (**termination refund or lump-sum retirement benefit**) shall be calculated pursuant to Section IX of the QILDRO and paid as follows:

$$\left(\frac{\text{(Enter A)}}{\text{(Enter B)}} \right) \times \text{(Enter C)} \times \text{(Enter D)} = \text{(Amount)}$$

(c) The alternate payee's benefit pursuant to QILDRO Section VI(A)(2) (**partial refund**) shall be calculated pursuant to Section IX of the QILDRO and paid as follows:

$$\left(\frac{\text{(Enter A)}}{\text{(Enter B)}} \right) \times \text{(Enter C)} \times \text{(Enter D)} = \text{(Amount)}$$

(d) The alternate payee's benefit pursuant to QILDRO Section VII(A)(2) (**lump-sum death benefit**) shall be calculated pursuant to Section IX of the QILDRO and paid as follows:

$$\left(\frac{\text{(Enter A)}}{\text{(Enter B)}} \right) \times \text{(Enter C)} \times \text{(Enter D)} = \text{(Amount)}$$

The Retirement System's Sole obligation with respect to the equations in this paragraph (3) is to pay the amounts calculated as a result of the equations. The Retirement System shall have no obligation to review or verify the equations or to assist in the calculations used to determine such amounts.

(4) **Percentage as of Retirement Date.** The following shall apply only if the QILDRO allocated benefits to the alternate payee in the specific Section noted. The Retirement System shall pay the amounts as directed below, but only if and when the benefits are payable pursuant to the QILDRO and Section 1-119 of the Illinois Pension Code (40 ILCS 5/1-119).

(a) The alternate payee's benefit pursuant to QILDRO Section III(A)(3) (**monthly retirement benefit**) shall be calculated and paid as follows:

$$\text{(Gross benefit amount)} \times \text{(Percentage)} = \text{(Monthly Amount)}$$

(b) The alternate payee's benefit pursuant to QILDRO Section V(A)(3) (**termination refund or lump-sum retirement benefit**) shall be calculated and paid as follows:

$$\text{(Gross benefit amount)} \times \text{(Percentage)} = \text{(Amount)}$$

(Member's Name)

(c) The alternate payee's benefit pursuant to QILDRO Section VI(A)(3) (**partial refund**) shall be calculated and paid as follows:

$$\frac{\text{_____}}{\text{(Gross benefit amount)}} \times \frac{\text{_____}}{\text{(Percentage)}} = \frac{\text{_____}}{\text{(Amount)}}$$

(d) The alternate payee's benefit pursuant to QILDRO Section VII(A)(3) (**lump-sum death benefit**) shall be calculated and paid as follows:

$$\frac{\text{_____}}{\text{(Gross benefit amount)}} \times \frac{\text{_____}}{\text{(Percentage)}} = \frac{\text{_____}}{\text{(Amount)}}$$

The Retirement System's sole obligation with respect to the equations in this paragraph (4) is to pay the amounts indicated as the result of the equations. The Retirement System shall have no obligation to review or verify the equations or to assist in the calculations used to determine such amounts.

(5) The Court retains jurisdiction over this matter for the following purposes:

- (a) to establish or maintain this Order as a QILDRO Calculation Court Order;
- (b) to enter amended QILDROs and QILDRO Calculation Court Orders to conform to the parties' QILDRO, Marital Settlement Agreement for Legal Separation ("Agreement"), to the parties' Judgment for Dissolution of Marriage or Judgment for Legal Separation ("Judgment"), to any modification of the parties' QILDRO, Agreement, or Judgment, or to any supplemental orders entered to clarify the parties' QILDRO, Agreement, or Judgment; and
- (c) to enter supplemental orders to clarify the intent of the parties or the Court regarding the benefits allocated herein in accordance with the parties' Agreement or Judgment, with any modifications of the parties' Agreement or Judgment, or with any supplemental orders entered to clarify the parties' Agreement or Judgment. A supplemental order may not require the Retirement System to take any action not permitted under Illinois law or the Retirement System's administrative rules. To the extent the supplemental order does not conform to Illinois law or administrative rule, it shall not be binding upon the Retirement System.

DATED: _____ SIGNED: _____
(Judge's Signature)

(Member's Signature- Optional)

(Member's Signature- Optional)