

MODEL DOMESTIC RELATIONS ORDER  
The Teachers' and State Employees' Retirement System

STATE OF NORTH CAROLINA

IN THE GENERAL COURT OF JUSTICE  
DISTRICT COURT DIVISION

COUNTY OF \_\_\_\_\_

\_\_\_ CVD \_\_\_\_\_

\_\_\_\_\_, )  
Plaintiff, )  
 )  
v. )  
 )  
\_\_\_\_\_, )  
Defendant. )

DOMESTIC RELATIONS ORDER  
(Teachers' and State Employees'  
Retirement System)

THIS MATTER coming on for hearing before the Honorable \_\_\_\_\_,  
District Court Judge presiding, in the civil District Court for \_\_\_\_\_ County, North  
Carolina;

AND IT APPEARING to the Court that an equitable distribution judgment has been  
entered in this action [OR: that the parties have agreed to the entry of a Consent Domestic  
Relations Order] concerning distribution of **plaintiff's/defendant's** interest in benefits payable  
by the Teachers' and State Employees' Retirement System of North Carolina;

NOW, THEN, the Court makes the following:

FINDINGS OF FACT

1. That the parties were formerly husband and wife, having married on \_\_\_\_\_, separated on \_\_\_\_\_, and are now divorced.
2. That an action seeking an equitable distribution of the parties' marital property and a judgment dividing said property has been entered by the Court **[OR: That parties have agreed to the entry of a Consent Domestic Relations Order regarding the division of benefits in a pension plan containing marital property]** pursuant to G.S. 50-20.
3. That at the time of the parties' separation, **plaintiff/defendant, [name]**, (redacted) Social Security number **xxx-xx-\_\_\_**, was a member of the Teachers' and State Employees' Retirement System of North Carolina (hereinafter "the Retirement System").

MODEL DOMESTIC RELATIONS ORDER  
The Teachers' and State Employees' Retirement System

**His/Her** last known address is \_\_\_\_\_. **His/Her** date of birth is \_\_\_\_\_.

4. This Order recognizes **plaintiff's/defendant's** (hereinafter "the non-member ex-spouse") marital interest in the benefits payable by the Retirement System to **plaintiff/defendant** (hereinafter "the member"). The marital interest of the non-member ex-spouse in the member's benefits payable by the Retirement System shall be calculated as follows: fifty per cent (50%) [or \_\_\_\_\_ per cent (\_\_\_\_ %)] of the amount determined by multiplying the member's total benefit by a fraction, the numerator of which shall be the total months of creditable service earned during the marriage, including creditable service purchased during the marriage, and the denominator of which shall be the member's total number of months of creditable service at the time of retirement or of a withdrawal of accumulated contributions.

OR

4. This Order recognizes **plaintiff's/defendant's** (hereinafter the non-member ex-spouse) marital interest in the benefits payable by the Retirement System to **plaintiff/defendant** (hereinafter the member). The marital interest of the non-member ex-spouse in the member's benefits payable by the Retirement System shall be calculated as follows: fifty per cent (50%) [or \_\_\_\_\_ per cent (\_\_\_\_ %)] of the member's benefit, commencing as of the member's actual retirement date, calculated by utilizing the member's average final compensation as of the date of separation, years of creditable service standing to his/her credit as of the date of separation, and the statutory accrual rate as of the date of retirement, unreduced by any reduction factor which may be applied for early retirement [or, reduced by the same percentage as is actually applied to the member's benefit for early retirement, if any].

5. The formula set forth in Finding of Fact 4 shall be applied to all retirement benefits payable to the member or to **his/her** designated survivor(s) under any option contained in G.S. 135-5(g). Should a return of contributions become payable pursuant to G.S. 135-5(f), the non-member ex-spouse shall be paid 50% [or \_\_\_\_\_ %] of the member's accumulated contributions as of the date of separation. Should a post-retirement return of accumulated contributions become payable pursuant to G.S. 135-5(g1) then the non-member ex-spouse shall be paid 50% [or \_\_\_\_\_ %] of the balance of the member's accumulated contributions at his/her death, plus accrued interest payable as applicable.

6. The formula set forth in Finding of Fact 4 **shall/shall not** apply to any Special Retirement Allowance which may become payable pursuant to G.S. 135-5(m1) or (m2) by virtue of a transfer of funds from the member's account with the Supplemental Retirement Income Plan (NC 401(k) Plan) or the Public Employee Deferred Compensation Plan (NC 457 Plan).

MODEL DOMESTIC RELATIONS ORDER  
The Teachers' and State Employees' Retirement System

WHEREFORE, based upon the foregoing Findings of Fact, the Court concludes as a matter of law that the non-member ex-spouse is entitled to the entry of an Order directing the distribution, in the manner set forth, to him/her of his/her marital share of a portion of all benefits payable by the Retirement System to the member.

IT IS THEREFORE ADJUDGED, ORDERED, AND DECREED:

1. The term "member" refers to plaintiff/defendant herein, and the term "non-member ex-spouse" refers to plaintiff/defendant herein.
2. That the name, last known mailing address, redacted social security number (xxx-xx-\_\_\_\_), and date of birth of the member are: \_\_\_\_\_.
3. That the name, last known mailing address, redacted social security number (xxx-xx-\_\_\_\_), and date of birth of the non-member ex-spouse are:  
\_\_\_\_\_.
4. That the name and mailing address of the Retirement System to which this Order is directed are: The Teachers' and State Employees' Retirement System of North Carolina, Retirement Systems Division, Department of State Treasurer, 325 North Salisbury Street, Raleigh, North Carolina, 27603-1385.
5. The Retirement System shall distribute to the non-member ex-spouse his/her marital share of the member's benefits payable by the Retirement System, calculated pursuant to the provisions of Findings of Fact 4 and 5 of this order. In the event that a return of accumulated contributions becomes payable pursuant to G.S. 135-5(f) or G.S. 135-5(g1), then the Retirement System shall distribute to the non-member ex-spouse his/her marital share of such a return of accumulated contributions, calculated pursuant to the provisions of Finding of Fact 5 of this order.
6. The non-member ex-spouse shall receive his/her share of the member's retirement benefits at such time and in such payment form as said benefits are paid to the member.
7. In the event that the non-member ex-spouse predeceases the member or the member's designated survivor for a retirement benefit, if any, the non-member ex-spouse's marital share of the member's retirement benefits shall revert to the member.
8. In the event that the Retirement System inadvertently pays to the member any benefits that are awarded to the non-member ex-spouse pursuant to the terms of this Order, the member shall immediately reimburse the non-member to the extent that he/she has received such benefit payments, and shall forthwith pay such amounts so received directly to the non-member

MODEL DOMESTIC RELATIONS ORDER  
The Teachers' and State Employees' Retirement System

within ten (10) days of receipt of such notice of overpayments.

9. Nothing in this Order shall be construed to require the Retirement System to provide to the non-member ex-spouse any type or form of benefit or any option not otherwise available to the member.

10. Nothing in this Order shall be construed to apply to any Special Retirement Allowance which may become payable pursuant to G.S. 135-5(m1) or (m2) by virtue of a transfer of funds from the member's account with the Supplemental Retirement Income Plan (NC 401(k) Plan) or the Public Employee Deferred Compensation Plan (NC 457 Plan). **[Note: If the parties intend for the Order to apply to the Special Retirement Allowance, then the Order must specifically and affirmatively so provide.]**

11. A copy of this Order shall be served upon the Administrator of the Teachers' and State Employees' Retirement System of North Carolina, and the Administrator shall determine, within a reasonable period of time, whether this Order can be administered by the Retirement System. This Order shall take effect immediately and shall remain in effect until further orders of this Court. Until this Order is accepted by the Retirement System, this Court retains jurisdiction to modify this Order as may be required or necessary.

This the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

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District Court Judge Presiding