



CONTINUING EDUCATION OF THE BAR ■ CALIFORNIA

## **Dividing Pensions and Other Employee Benefits in California Divorces**

**First Edition**

**September 2023 Update**

### **Filing Instructions**

This packet contains replacement pages to be interleaved in the main text, including a complete replacement of Chapters 12–14 and 18, as well as the “Tables” and “Index” sections at the end of the book. For a complete list of all pages that should be in your binder after inserting the revised pages, see the accompanying Page List.

*Remove old pages*

*Insert new pages*

#### **Front Matter**

Title page—masthead

same

#### **Contents (tab)**

vii—xxv

same

#### **1. Case Assessment & Planning (tab)**

1-11—1-12

1-11—1-12.1

1-31—1-32

1-31—1-32.1

1-41—1-42

1-41—1-42.1

1-45—1-46

same

**Attorney-drafted forms are available for this title.  
Please visit [ceb.com](http://ceb.com) or  
call 1-800-232-3444 for details.**

*Remove old pages*

*Insert new pages*

**2. Initial Procedures & Pretrial Orders (tab)**

2-33—2-36	same
2-39—2-49	same

**3. Discovery & Valuation of Employee Benefits (tab)**

3-19—3-20	same
3-37—3-38	same
3-44.1—3-44.2	same

**4. Settlement-, Trial-, & Judgment-Related Matters (tab)**

4-17—4-18	same
-----------	------

**5. Benefit Plans Governed by ERISA (tab)**

5-17—5-18	same
-----------	------

**6. Use of QDROs to Divide Benefits (tab)**

6-5—6-6	same
6-29—6-30	6-29—6-30.1
6-69—6-74	same

**7. Review of QDROs by Corporate Plans (tab)**

7-15—7-16	7-15—7-16.1
-----------	-------------

**8. Review of QDROs by Union Plans (tab)**

8-5—8-8	8-5—8-8.1
8-13—8-14	same

**9. Welfare & Other Nonpension Benefits (tab)**

9-7—9-10	same
9-16.1—9-20	same
9-29—9-30	same

**10. Stock Options & Executive Benefits (tab)**

10-3—10-6	same
-----------	------

**12. CalPERS Benefits (tab)**

12-1—12-49	12-1—12-55
------------	------------

**13. CalSTRS Benefits (tab)**

13-1—13-37	13-1—13-35
------------	------------

*Remove old pages*

*Insert new pages*

**14. County & Municipal Benefits (tab)**

14-1—14-33

14-1—14-36

**15. FERS Benefits (tab)**

15-17—15-18.1

same

15-27—15-28

same

15-29—15-30

same

**17. Military Retirement Benefits (tab)**

17-9—17-12

same

17-15—17-16

same

17-19—17-20

17-19—17-20.1

17-37—17-40

same

17-69—17-70

same

17-75—17-76

same

17-79—17-80

same

17-89—17-90

same

**18. Railroad Retirement Benefits (tab)**

18-1—18-14

same

**Tables (tab)**

T-1—T-33

T-1—T-34

**Index (tab)**

I-1—I-59

I-1—I-60

**Current CEB Update List**





CONTINUING EDUCATION OF THE BAR ■ CALIFORNIA

## **Dividing Pensions and Other Employee Benefits in California Divorces**

**First Edition**

**September 2023 Update**

### **Page List**

This is a complete list of all pages that should be in your binder after filing the September 2023 update. Previous updates were published in July 2013, July 2014, July 2015, July 2016, September 2017, September 2018, September 2019, September 2020, September 2021, and September 2022.

#### **Front Matter**

Title page—masthead 9/23

#### **Contents (tab)**

vii—xxv 9/23

#### **1. Case Assessment & Planning (tab)**

1-1—1-10 9/22

1-11—1-12.1 9/23

1-13—1-30 9/22

1-31—1-32.1 9/23

1-33—1-40 9/22

1-41—1-42.1 9/23

1-43—1-44 9/22

1-45—1-46 9/23

1-47—1-60 9/22

**PLEASE MAKE SURE YOUR VOLUME IS COMPLETE  
BEFORE RECYCLING DISCARDED PAGES**

**2. Initial Procedures & Pretrial Orders (tab)**

2-1—2-32	9/22
2-33—2-36	9/23
2-37—2-38	9/22
2-39—2-49	9/23

**3. Discovery & Valuation of Employee Benefits (tab)**

3-1—3-2	7/14
3-3—3-4	9/21
3-5—3-6	9/22
3-6.1	9/21
3-7—3-10	9/19
3-10.1	9/18
3-11—3-12.2	9/17
3-13—3-14.1	9/21
3-15—3-16	9/17
3-17—3-18.1	9/19
3-19—3-20	9/23
3-21—3-24	9/19
3-24.1	9/18
3-25—3-29	9/17
3-30 is blank.	
3-31—3-32	7/14
3-33—3-34	9/19
3-35—3-36	9/21
3-37—3-38	9/23
3-39—3-40	9/22
3-41—3-44	9/17
3-44.1—3-44.2	9/23
3-45	9/17
3-46 is blank.	
3-47—3-58	7/14
3-59—3-60	9/17
3-61—3-65	7/14

**4. Settlement-, Trial-, & Judgment-Related Matters (tab)**

4-1—4-4	7/13
4-5—4-6	9/21
4-6.1—4-7	7/16
4-8 is blank.	
4-9—4-10	9/21
4-11—4-12	7/13
4-13—4-16	9/17

4-16.1—4-16.2	9/20
4-17—4-18	9/23
4-19—4-21	9/18
4-22 is blank.	
4-23—4-24	9/20
4-25—4-26	9/18
4-27—4-30	7/15
4-31—4-32	9/20
4-32.1—4-33	7/15
4-34 is blank.	
4-35—4-36	7/13
4-37—4-40	9/18
4-41—4-42	7/13
4-43—4-44	9/20
4-44.1—4-44.2	9/19
4-45	9/17
4-46 is blank.	
4-47—4-48	9/19
4-49—4-50	9/17
4-51—4-52.1	9/19
4-53—4-54	9/22
4-54.1—4-55	9/19
4-56 is blank.	
4-57—4-58	9/18
<b>5. Benefit Plans Governed by ERISA (tab)</b>	
5-1—5-2	7/15
5-3—5-4/4	9/17
5-5—5-6.1	9/20
5-7—5-12	9/17
5-13—5-14	9/19
5-14.1	9/22
5-15—5-16	9/17
5-17—5-18	9/23
5-18.1	9/18
5-19—5-20/20	9/17
5-21—5-22	9/21
5-22.1	9/19
5-23—5-24	9/17
<b>6. Use of QDROs to Divide Benefits (tab)</b>	
6-1—6-4	9/22
6-5—6-6	9/23

6-7—6-28	9/22
6-29—6-30.1	9/23
6-31—6-68	9/22
6-69—6-74	9/23
6-75—6-82	9/22

**7. Review of QDROs by Corporate Plans (tab)**

7-1—7-2	7/13
7-3—7-4	9/17
7-5—7-6	9/19
7-6.1—7-6.2	9/22
7-7/8	9/18
7-9—7-10	9/20
7-11—7-12	9/19
7-13—7-14	9/17
7-15—7-16.1	9/23
7-17—7-24	9/19
7-25—7-26	9/21
7-26.1—7-26.2	9/22
7-26.3	9/21
7-27—7-28	9/18
7-29—7-30	9/19
7-31—7-32.1	9/20
7-33—7-34	9/22
7-35—7-36	9/20
7-37/38	9/19
7-39—7-40	9/20

**8. Review of QDROs by Union Plans (tab)**

8-1—8-4	9/21
8-5—8-8.1	9/23
8-9—8-12	9/21
8-13—8-14	9/23

**9. Welfare & Other Nonpension Benefits (tab)**

9-1—9-2.1	9/22
9-3—9-6	9/21
9-7—9-10	9/23
9-11—9-14	9/21
9-15—9-16	9/22
9-16.1—9-20	9/23
9-21—9-24	9/22
9-25—9-28	9/21



9-29—9-30	9/23
9-31—9-36	9/21
<b>10. Stock Options &amp; Executive Benefits (tab)</b>	
10-1—10-2	7/13
10-3—10-6	9/23
10-7—10-8	9/18
10-8.1—10-8.2	9/19
10-9/10	9/18
10-11—10-12	9/17
10-13—10-14.1	9/20
10-15—10-16.1	9/22
10-17—10-18	9/20
10-18.1	9/18
10-19—10-20	9/17
<b>11. IRA Accounts &amp; Small-Employer Plans (tab)</b>	
11-1—11-2	9/21
11-3—11-4	9/18
11-5—11-6.1	9/22
11-7—11-8	9/20
11-9—11-10	9/18
11-10.1	9/17
11-11—11-12	9/18
11-13—11-14	9/17
11-15—11-16	7/13
<b>12. CalPERS Benefits (tab)</b>	
12-1—12-55	9/23
<b>13. CalSTRS Benefits (tab)</b>	
13-1—13-35	9/23
<b>14. County &amp; Municipal Benefits (tab)</b>	
14-1—14-36	9/23
<b>15. FERS Benefits (tab)</b>	
15-1—15-2	9/19
15-3—15-4	9/20
15-5—15-6	9/19
15-7—15-8	9/17
15-9—15-10	9/19
15-11—15-12	9/17

15-13—15-14	9/19
15-15—15-16	9/22
15-17—15-18.1	9/23
15-19—15-24.1	9/19
15-25—15-26	9/17
15-27—15-28	9/23
15-28.1	9/22
15-29—15-30	9/23
15-31—15-32	9/19
15-33—15-34	9/20
15-35	9/19

**16. CSRS Benefits (tab)**

16-1—16-2	9/19
16-3—16-4	9/22
16-5—16-16	9/19
16-17—16-18.1	9/22
16-19—16-22	9/19

**17. Military Retirement Benefits (tab)**

17-1—17-8	9/22
17-9—17-12	9/23
17-13—17-14	9/22
17-15—17-16	9/23
17-17—17-18	9/22
17-19—17-20.1	9/23
17-21—17-36	9/22
17-37—17-40	9/23
17-41—17-68	9/22
17-69—17-70	9/23
17-71—17-74	9/22
17-75—17-76	9/23
17-77—17-78	9/22
17-79—17-80	9/23
17-81—17-88	9/22
17-89—17-90	9/23
17-91—17-98	9/22

**18. Railroad Retirement Benefits (tab)**

18-1—18-14	9/23
------------	------

**Tables (tab)**

T-1—T-34	9/23
----------	------

**Index (tab)**

I-1—I-60

9/23

**Current CEB Update List**

