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**Dissolution Intake Worksheet**

**Your Info:**

Client Full Legal Name: \_\_\_\_\_

Prior names/or AKA: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

What county do you reside in: \_\_\_\_\_

Is this the marital home:  yes  no

How long have you lived here: \_\_\_\_\_

Email address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Birth Date: \_\_\_\_\_ SSN: \_\_\_\_\_

Prior Name: \_\_\_\_\_

Do you plan on changing your name after divorce? \_\_\_\_\_

**Spouse Info:**

Spouse Name: \_\_\_\_\_

Spouse Address: \_\_\_\_\_

\_\_\_\_\_

Spouse Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Spouse Phone: \_\_\_\_\_ email: \_\_\_\_\_

Are either of you in the military: \_\_\_\_\_

Do you reside with spouse still: \_\_\_\_\_

Prior Name: \_\_\_\_\_

Do they plan on changing their name after divorce? \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Where were you married: \_\_\_\_\_

*City/State*

Date of Separation: \_\_\_\_\_

Has domestic abuse been alleged in this marriage? \_\_\_\_\_

If so, against whom: \_\_\_\_\_ Is there an order for protection in effect: \_\_\_\_\_

Provide some details: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Joint Minor Child #1 Name: \_\_\_\_\_

Who does child currently reside with primarily? \_\_\_\_\_

Telephone: \_\_\_\_\_ SSN: \_\_\_\_\_

Birthdate: \_\_\_\_\_  Son  Daughter

Is this a Joint child with current spouse?  Yes  No

Joint Minor Child #2 Name: \_\_\_\_\_

Who does child currently reside with primarily? \_\_\_\_\_

Telephone: \_\_\_\_\_ SSN: \_\_\_\_\_

Birthdate: \_\_\_\_\_  Son  Daughter

Is this a Joint child with current spouse?  Yes  No

Joint Minor Child #3 Name: \_\_\_\_\_

Who does child currently reside with primarily? \_\_\_\_\_

Telephone: \_\_\_\_\_ SSN: \_\_\_\_\_

Birthdate: \_\_\_\_\_  Son  Daughter

Is this a Joint child with current spouse?  Yes  No

Joint Minor Child #4 Name: \_\_\_\_\_

Who does child currently reside with primarily? \_\_\_\_\_

Telephone: \_\_\_\_\_ SSN: \_\_\_\_\_

Birthdate: \_\_\_\_\_  Son  Daughter

Is this a Joint child with current spouse?  Yes  No

Where you previously married?  Yes  No

Prior Spouse Name: \_\_\_\_\_

For any children you had with prior spouse:

Child #1 Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Birthdate: \_\_\_\_\_  Son  Daughter

Child #2 Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Birthdate: \_\_\_\_\_  Son  Daughter

Child #3 Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Birthdate: \_\_\_\_\_  Son  Daughter

### Property Owned

**Real estate owned #1** Address: \_\_\_\_\_  
\_\_\_\_\_

Estimated value: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Amount Owed: \_\_\_\_\_ Mortgage Company: \_\_\_\_\_

What kind of property is this?: \_\_\_\_\_

Who else owns this with you? \_\_\_\_\_

Who is on the mortgage: \_\_\_\_\_

Do one of you plan on keeping this property? \_\_\_\_\_ if so, who: \_\_\_\_\_

What county is this property located in: \_\_\_\_\_, state: \_\_\_\_\_

*Note: If you can provide a legal description (found on deed or title), please include that when you return this document*

**Real estate owned #2** Address: \_\_\_\_\_

\_\_\_\_\_

Estimated value: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Amount Owed: \_\_\_\_\_ Mortgage Company: \_\_\_\_\_

What kind of property is this?: \_\_\_\_\_

Who else owns this with you? \_\_\_\_\_

Who is on the mortgage: \_\_\_\_\_

Do one of you plan on keeping this property? \_\_\_\_\_ if so, who: \_\_\_\_\_

What county is this property located in: \_\_\_\_\_, state: \_\_\_\_\_

**Real estate owned #3** Address: \_\_\_\_\_

\_\_\_\_\_

Estimated value: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Amount Owed: \_\_\_\_\_ Mortgage Company: \_\_\_\_\_

What kind of property is this?: \_\_\_\_\_

Who else owns this with you? \_\_\_\_\_

Who is on the mortgage: \_\_\_\_\_

Do one of you plan on keeping this property? \_\_\_\_\_ if so, who: \_\_\_\_\_

What county is this property located in: \_\_\_\_\_, state: \_\_\_\_\_

**Vehicles and ATV/Boats/RV**

Automobiles #1      Make: \_\_\_\_\_ Model: \_\_\_\_\_ Year: \_\_\_\_\_  
                            Est. Value: \_\_\_\_\_ Vin: \_\_\_\_\_  
Name(s) on title? \_\_\_\_\_  
Loan amount on vehicle: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_  
Who drives this vehicle: \_\_\_\_\_ Who should keep vehicle: \_\_\_\_\_

Automobiles #2      Make: \_\_\_\_\_ Model: \_\_\_\_\_ Year: \_\_\_\_\_  
                            Est. Value: \_\_\_\_\_ Vin: \_\_\_\_\_  
Name(s) on title? \_\_\_\_\_  
Loan amount on vehicle: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_  
Who drives this vehicle: \_\_\_\_\_ Who should keep vehicle: \_\_\_\_\_

Automobiles #3      Make: \_\_\_\_\_ Model: \_\_\_\_\_ Year: \_\_\_\_\_  
                            Est. Value: \_\_\_\_\_ Vin: \_\_\_\_\_  
Name(s) on title? \_\_\_\_\_  
Loan amount on vehicle: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_  
Who drives this vehicle: \_\_\_\_\_ Who should keep vehicle: \_\_\_\_\_

Automobiles #4      Make: \_\_\_\_\_ Model: \_\_\_\_\_ Year: \_\_\_\_\_  
                            Est. Value: \_\_\_\_\_ Vin: \_\_\_\_\_  
Name(s) on title? \_\_\_\_\_  
Loan amount on vehicle: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_  
Who drives this vehicle: \_\_\_\_\_ Who should keep vehicle: \_\_\_\_\_

**Boats / RV's / ATV**

- 1) Make/Model \_\_\_\_\_ Year: \_\_\_\_\_ Value: \_\_\_\_\_  
Who should keep: \_\_\_\_\_ Loan Balance: \_\_\_\_\_
- 2) Make/Model \_\_\_\_\_ Year: \_\_\_\_\_ Value: \_\_\_\_\_  
Who should keep: \_\_\_\_\_ Loan Balance: \_\_\_\_\_
- 3) Make/Model \_\_\_\_\_ Year: \_\_\_\_\_ Value: \_\_\_\_\_  
Who should keep: \_\_\_\_\_ Loan Balance: \_\_\_\_\_
- 4) Make/Model \_\_\_\_\_ Year: \_\_\_\_\_ Value: \_\_\_\_\_  
Who should keep: \_\_\_\_\_ Loan Balance: \_\_\_\_\_
- 5) Make/Model \_\_\_\_\_ Year: \_\_\_\_\_ Value: \_\_\_\_\_  
Who should keep: \_\_\_\_\_ Loan Balance: \_\_\_\_\_
- 6) Make/Model \_\_\_\_\_ Year: \_\_\_\_\_ Value: \_\_\_\_\_  
Who should keep: \_\_\_\_\_ Loan Balance: \_\_\_\_\_

**Bank Accounts**

- 1) Type of account: \_\_\_\_\_ What institution/bank: \_\_\_\_\_  
Who's name(s) on act? \_\_\_\_\_ Estimated Balance: \_\_\_\_\_
- 2) Type of account: \_\_\_\_\_ What institution/bank: \_\_\_\_\_  
Who's name(s) on act? \_\_\_\_\_ Estimated Balance: \_\_\_\_\_
- 3) Type of account: \_\_\_\_\_ What institution/bank: \_\_\_\_\_  
Who's name(s) on act? \_\_\_\_\_ Estimated Balance: \_\_\_\_\_
- 4) Type of account: \_\_\_\_\_ What institution/bank: \_\_\_\_\_  
Who's name(s) on act? \_\_\_\_\_ Estimated Balance: \_\_\_\_\_
- 5) Type of account: \_\_\_\_\_ What institution/bank: \_\_\_\_\_  
Who's name(s) on act? \_\_\_\_\_ Estimated Balance: \_\_\_\_\_

**Credit Card/Loans**

- 1) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 2) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 3) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 4) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 5) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 6) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 7) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_
- 8) Account name: \_\_\_\_\_ Type of account: \_\_\_\_\_  
Who's name on account: \_\_\_\_\_ Balance: \_\_\_\_\_  
Account Number (last 4): \_\_\_\_\_ comments: \_\_\_\_\_

**Your Retirement Accounts**

1) Type of account (pension/401(k)/Ira Etc): \_\_\_\_\_

Name of Retirement fund/Account: \_\_\_\_\_

Estimated Value: \_\_\_\_\_

Did you ever contribute to this account prior to marriage?  Yes  No

2) Type of account (pension/401(k)/Ira Etc): \_\_\_\_\_

Name of Retirement fund/Account: \_\_\_\_\_

Estimated Value: \_\_\_\_\_

Did you ever contribute to this account prior to marriage?  Yes  No

3) Type of account (pension/401(k)/Ira Etc): \_\_\_\_\_

Name of Retirement fund/Account: \_\_\_\_\_

Estimated Value: \_\_\_\_\_

Did you ever contribute to this account prior to marriage?  Yes  No

**Spouse's Retirement Accounts**

1) Type of account (pension/401(k)/Ira Etc): \_\_\_\_\_

Name of Retirement fund/Account: \_\_\_\_\_

Estimated Value: \_\_\_\_\_

Did spouse ever contribute to this account prior to marriage?  Yes  No

2) Type of account (pension/401(k)/Ira Etc): \_\_\_\_\_

Name of Retirement fund/Account: \_\_\_\_\_

Estimated Value: \_\_\_\_\_

Did you ever contribute to this account prior to marriage?  Yes  No



3) Type of account (pension/401(k)/Ira Etc): \_\_\_\_\_

Name of Retirement fund/Account: \_\_\_\_\_

Estimated Value: \_\_\_\_\_

Did you ever contribute to this account prior to marriage?  Yes  No

Life Insurance: Company: \_\_\_\_\_

Covering who?: \_\_\_\_\_

Value of Insurance: \_\_\_\_\_

Payable to who? \_\_\_\_\_

Life Insurance: Company: \_\_\_\_\_

Covering who?: \_\_\_\_\_

Value of Insurance: \_\_\_\_\_

Payable to who? \_\_\_\_\_

Life Insurance: Company: \_\_\_\_\_

Covering who?: \_\_\_\_\_

Value of Insurance: \_\_\_\_\_

Payable to who? \_\_\_\_\_

Life Insurance: Company: \_\_\_\_\_

Covering who?: \_\_\_\_\_

Value of Insurance: \_\_\_\_\_

Payable to who? \_\_\_\_\_

### **Business Ownership**

Do either you or spouse have any ownership interests in businesses, including LLC, Corps, Sole proprietorships? If so, please list below:

Company: \_\_\_\_\_ Address: \_\_\_\_\_

\_\_\_\_\_

Who is involved in this business: \_\_\_\_\_

Value of ownership interest: \_\_\_\_\_

Do either of you work here regularly: \_\_\_\_\_

Did this business start prior to the marriage: \_\_\_\_\_

Other info that would be helpful to know about the business: \_\_\_\_\_

\_\_\_\_\_

**Other significant Assets**

1) \_\_\_\_\_

Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

2) \_\_\_\_\_

Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

3) \_\_\_\_\_

Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

4) \_\_\_\_\_

Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

5) \_\_\_\_\_

Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

6) \_\_\_\_\_  
Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

7) \_\_\_\_\_  
Approximate value: \_\_\_\_\_ Who should keep: \_\_\_\_\_

Does either party have a non-marital claim (prior to marriage or inherited): \_\_\_\_\_

### **Your Employment / Income**

Job/Income 1: \_\_\_\_\_ Position: \_\_\_\_\_

Address: \_\_\_\_\_ Start date: \_\_\_\_\_

Pay rate/salary: \_\_\_\_\_

Monthly Gross income : \_\_\_\_\_ Monthly Net Income: \_\_\_\_\_

Job/Income 2: \_\_\_\_\_ Position: \_\_\_\_\_

Address: \_\_\_\_\_ Start date: \_\_\_\_\_

Pay rate/salary: \_\_\_\_\_

Monthly Gross income : \_\_\_\_\_ Monthly Net Income: \_\_\_\_\_

### **Spouses Employment / Income**

Job/Income 1: \_\_\_\_\_ Position: \_\_\_\_\_

Address: \_\_\_\_\_ Start date: \_\_\_\_\_

Pay rate/salary: \_\_\_\_\_

Monthly Gross income : \_\_\_\_\_ Monthly Net Income: \_\_\_\_\_

Job/Income 2: \_\_\_\_\_ Position: \_\_\_\_\_

Address: \_\_\_\_\_ Start date: \_\_\_\_\_

\_\_\_\_\_

Pay rate/salary: \_\_\_\_\_

Monthly Gross income : \_\_\_\_\_ Monthly Net Income: \_\_\_\_\_

### Health Insurance

Do you have health insurance available through your employer: \_\_\_\_\_

Where do you currently get your health insurance

My Employer

Spouse's Employer

Other: \_\_\_\_\_

Does your spouse have health insurance available through his employer?

Where does your spouse get health insurance from

My Employer

Spouse's Employer

Other: \_\_\_\_\_

Where do your children currently get health insurance

My Employer

Spouse's Employer

Other: \_\_\_\_\_

If you know costs for children's health insurance, please provide details

Cost of Insurance for you only: \_\_\_\_\_

Cost of insurance for you plus child(ren): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you or your children currently take advantage of any welfare benefits, such as medical assistance, Food stamps, MFIP, GA, etc.? \_\_\_\_\_

If so, please

list: \_\_\_\_\_

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Are you currently attending school: \_\_\_\_\_ If so, provide details: \_\_\_\_\_

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### **Custody / Parenting Time**

Have you and your spouse worked out a custody and parenting time agreement: \_\_\_\_\_

If so, please provide details: \_\_\_\_\_

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What would you like to happen?

Legal Custody (who makes big decisions)

Joint legal custody (share in decision making)

Sole legal custody (you alone make decisions)

Physical Custody (primary residence)

Joint Physical Custody

Sole Physical custody

Is your spouse in agreement with this plan? \_\_\_\_\_

What would an ideal parenting time plan look like ?

*Keep in mind that the courts will GENERALLY expect a minimum of 25% parenting time for each parent*

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### Spousal Support

When you are accustomed to a certain lifestyle, and if you are not able to provide for your living expenses after separation, the court may grant spousal support based upon your need.

Do you believe that spousal support will be needed in this case? \_\_\_\_\_

If so, in what amount would you anticipate: \_\_\_\_\_

Who was the primary earner in the marriage?

Do you or spouse primarily stay home with children, so the other spouse could work? \_\_\_\_\_

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List any other details that you think may be important about your case or situation:

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### DOCUMENTS

In all divorces, we need to exchange copies of all relevant financial documents with the other party. This is known as discovery. To help make this process quicker and smoother for all involved, I ask that you try and collect and provide me with copies of relevant documents as soon as possible.

If you are able to supply copies of financial documents when you return this worksheet, please do. If not, please try to do so within 30 days.

Documents to provide:

1. Paystubs, W-2s, tax return
2. Bank Account Statements, stock trading and money market accounts
3. Retirement Account Statements, pension statements
4. Mortgage Statements, Loan Statements, credit card statements
5. Deed or other property ownership records
6. Life insurance police (face sheet)