

CLIENT INFORMATION - DISSOLUTION

1. Client

Name: _____

Address: _____

Telephone: _____ (work) _____ (home) _____ (cell)

Date of Birth: _____ Age: _____ SS#: _____

Height: _____ Weight: _____ Eyes: _____ Hair: _____

Employer: _____

Employer Address: _____

Position/Occupation: _____ Years of Service: _____

Present Income:

Gross Monthly \$ _____

Payroll Deductions \$ _____

Net Monthly \$ _____

Pension/Profit Sharing/Other Deferred Compensation/Bonus/Stock Options:

Employment Benefits (i.e., health insurance, life insurance, automobile expense, expense account):

Education, Employment History and Job Skills:

Wills: _____

Power of Attorney: _____ Date Signed: _____

Prior Divorce: Yes No

When: _____

Where: _____

Date Decree Entered: _____

Child Support/Maintenance paid by you: _____

Child Support/Maintenance received by you: _____

2. Date of Marriage: _____ Place of Marriage: _____

Pre-Nuptial Agreement: Yes No

3. Date of Separation: _____

4. Spouse:

Name: _____

Address: _____

Telephone: _____ (work) _____ (home) _____ (cell)

Date of Birth: _____ Age: _____ SS#: _____

Height: _____ Weight: _____ Eyes: _____ Hair: _____

Employer: _____

Employer Address: _____

Position/Occupation: _____ Years of Service: _____

Present Income:

Gross Monthly \$ _____

Payroll Deductions \$ _____

Net Monthly \$ _____

Pension/Profit Sharing/Other Deferred Compensation/Bonus/Stock Options:

Employment Benefits (i.e., health insurance, life insurance, automobile expense, expense account):

Education, Employment History and Job Skills:

Wills: _____

Power of Attorney: _____ Date Signed: _____

Prior Divorce: Yes No

When: _____

Where: _____

Date Decree Entered: _____

Child Support/Maintenance paid by spouse: _____

Child Support/Maintenance received by spouse: _____

Spouse's Attorney: _____

5. Children

Name(s)	Birthdate(s)	SS#(s)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Current residence:

Preferred custody:

Special circumstances affecting custody or child support:

Special medical circumstances affecting the child(ren) [financial]:

6. Closely held business/professional practices (describe):

7. Review of assets and obligations: (please complete the attached form)

8. Relief Needed:

- Petition for Dissolution/Separation
- Response to Petition for Dissolution/Separation
- Petition for Temporary Orders (complete financial affidavit)
- Modify Support
- Modify Custody
- Order of Protection
- Exclusive use of marital residence
- Other Relief Necessary _____

9. Fee Quoted:

Retainer \$ _____

Hourly or other provisions \$ _____

Fee Contract executed: Yes No

Source of funds for retainer: _____

Assets and Obligations

C=Community Property

SS=Sole & Separate Property

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
<p>1. Marital Residence</p> <p>(a) Address: _____</p> <p>(b) Purchase Price: \$ _____</p> <p>(c) Improvements: _____</p> <p>(d) Present Value: \$ _____</p> <p>(e) Liens/Mortgage:</p> <p style="padding-left: 20px;">(i) Holder: _____</p> <p style="padding-left: 20px;">Balance: \$ _____</p> <p style="padding-left: 20px;">Monthly Payment: \$ _____</p> <p style="padding-left: 20px;">Balloons: \$ _____ Due _____</p> <p style="padding-left: 20px;">(ii) Holder: _____</p> <p style="padding-left: 20px;">Balance: \$ _____</p> <p style="padding-left: 20px;">Monthly Payment: \$ _____</p> <p style="padding-left: 20px;">Balloons: \$ _____ Due _____</p> <p>Title Status: _____</p>						
<p>2. Other Real Property</p> <p>(a) Address: _____</p> <p>(b) Purchase Price: \$ _____</p> <p>(c) Improvements: _____</p> <p>(d) Present Value: \$ _____</p> <p>(e) Liens/Mortgage:</p> <p style="padding-left: 20px;">(i) Holder: _____</p> <p style="padding-left: 20px;">Balance: \$ _____</p> <p style="padding-left: 20px;">Monthly Payment: \$ _____</p> <p style="padding-left: 20px;">Balloons: \$ _____ Due _____</p> <p style="padding-left: 20px;">(ii) Holder: _____</p> <p style="padding-left: 20px;">Balance: \$ _____</p> <p style="padding-left: 20px;">Monthly Payment: \$ _____</p> <p style="padding-left: 20px;">Balloons: \$ _____ Due _____</p> <p>Title Status: _____</p>						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
<p>3. <u>Automobiles</u></p> <p>(i) (a) Description: Year _____ Make _____ Model _____</p> <p>(b) Present Value: \$ _____</p> <p>(c) Liens: Holder: _____ Balance: \$ _____ Monthly Payment: \$ _____ Payoff date: _____ Purchase Price \$ _____ Title Status _____</p> <p>(ii) (a) Description: Year _____ Make _____ Model _____</p> <p>(b) Present Value: \$ _____</p> <p>(c) Liens: Holder: _____ Balance: \$ _____ Monthly Payment: \$ _____ Payoff date: _____ Purchase Price \$ _____ Title Status _____</p> <p>(iii) (a) Description: Year _____ Make _____ Model _____</p> <p>(b) Present Value: \$ _____</p> <p>(c) Liens: Holder: _____ Balance: \$ _____ Monthly Payment: \$ _____ Payoff date: _____ Purchase Price \$ _____ Title Status _____</p>						
<p>4. <u>Savings, checking, Money Market Accounts:</u></p> <p>(a) Institution: _____ Account #: _____ Last known balance: \$ _____ Name(s) on account: _____</p> <p>(b) Institution: _____</p>						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
Account #: _____ Last known balance: \$ _____ Name(s) on account: _____ (c) Institution: _____ Account #: _____ Last known balance: \$ _____ Name(s) on account: _____ (d) Institution: _____ Account #: _____ Last known balance: \$ _____ Name(s) on account: _____						
5. Brokerage Accounts: (a) Brokerage Company: _____ (b) Stocks Owned: _____ (c) Identity: _____ (d) # of Shares: _____ (e) Value: _____ (f) Amount owed on margin or otherwise borrowed: _____ (a) Brokerage Company: _____ (b) Stocks Owned: _____ (c) Identity: _____ (d) # of Shares: _____ (e) Value: _____ (f) Amount owed on margin or otherwise borrowed: _____						
6. Promissory Notes, Bonds, Funds Held by Others: (a) _____ (b) _____ (c) _____						
7. Trusts: (a) Trustee: _____ (b) Terms: _____						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
8. <u>Partnerships:</u> (a) Name: _____ (b) Type/Description: _____ (c) Purchase Price: \$ _____ (d) Remaining Payments: _____ (e) General Partner: _____ (f) Title: _____						
9. <u>Private Pensions/Keogh's (IRA's)/Military Pensions/Annuities:</u> (a) Institution/Employer: _____ (b) Type of benefit plan: _____ (c) Dates accrued: _____ (d) Vesting: _____ (e) Account Balance/Accrued Benefit: _____						
10. <u>Periodic Payments:</u> (a) Workers Compensation: _____ (b) Disability Insurance: _____ (c) Severance/Termination Pay: _____ (d) Unemployment Compensation: _____						
11. <u>Employment Related Marital Property in Name of Husband or Wife:</u> (a) Stock Options: _____ (b) Accrued Vacation/Leave Time for which employee may receive compensation: _____ (c) Accrued portion of bonus: _____						
12. <u>Jewelry, Coins/Stamps/Collectible Artwork of Significant Value:</u> (i) (a) Description: _____ (b) Purchase Price: _____ (c) Current Value: _____						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
(ii)(a) Description; _____ (b) Purchase Price: _____ (c) Current Value: _____						
(iii) (a) Description; _____ (b) Purchase Price: _____ (c) Current Value: _____						
13. <u>Furniture/Household Property:</u> Description _____ Value _____						
14. <u>Boat:</u> (i) (a) Description: Year _____ Make _____ Model _____ (b) Present Value: \$ _____ (c) Liens: Holder: _____ Balance: \$ _____ Monthly Payment: \$ _____ Payoff date: _____						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
Purchase Price \$ _____ Title Status _____ (ii) (a) Description: Year _____ Make _____ Model _____ (b) Present Value: \$ _____ (c) Liens: Holder: _____ Balance: \$ _____ Monthly Payment: \$ _____ Payoff date: _____ Purchase Price \$ _____ Title Status _____						
15. <u>Airplane:</u> (a) Description: Year _____ Make _____ Model _____ (b) Present Value: \$ _____ (c) Liens: Holder: _____ Balance: \$ _____ Monthly Payment: \$ _____ Payoff date: _____ Purchase Price \$ _____ Title Status _____						
16. <u>Pets/Livestock/Animals of Significant Value:</u> (i) (a) Name: _____ Age: _____ (b) Purchase Price: _____ (c) Value: _____ (ii) (a) Name: _____ Age: _____ (b) Purchase Price: _____ (c) Value: _____ (iii) (a) Name: _____ Age: _____ (b) Purchase Price: _____ (c) Value: _____						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
17. <u>Life Insurance/Annuities:</u> (i)(a) Insurer: _____ (b) Policy #: _____ (c) Type of Policy: _____ (d) Face Value: _____ (e) Premium: _____ Due Date: _____ (f) Insured: _____ (g) Owner: _____ (h) Beneficiary: _____ (ii)(a) Insurer: _____ (b) Policy #: _____ (c) Type of Policy: _____ (d) Face Value: _____ (e) Premium: _____ Due Date: _____ (f) Insured: _____ (g) Owner: _____ (h) Beneficiary: _____						
18. <u>Loans/Lines of Credit:</u> (i) (a) Institution/Lender: _____ (b) Description of Debt: _____ (c) Date of Loan: _____ (d) Initial Amount of Loan: _____ (e) Current Balance: _____ (ii) (a) Institution/Lender: _____ (b) Description of Debt: _____ (c) Date of Loan: _____ (d) Initial Amount of Loan: _____ (e) Current Balance: _____ (iii) (a) Institution/Lender: _____ (b) Description of Debt: _____ (c) Date of Loan: _____ (d) Initial Amount of Loan: _____						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
(e) Current Balance: _____						
(iv) (a) Institution/Lender: _____ (b) Description of Debt: _____ (c) Date of Loan: _____ (d) Initial Amount of Loan: _____ (e) Current Balance: _____						
19. <u>Credit Card/Department Store Obligations:</u> (i) (a) Card/Store: _____ (b) Name(s) on Account: _____ (c) Account # _____ (d) Minimum Monthly Payment: _____ (e) Current Account Balance: _____ (ii) (a) Card/Store: _____ (b) Name(s) on Account: _____ (c) Account # _____ (d) Minimum Monthly Payment: _____ (e) Current Account Balance: _____ (iii) (a) Card/Store: _____ (b) Name(s) on Account: _____ (c) Account # _____ (d) Minimum Monthly Payment: _____ (e) Current Account Balance: _____ (iv) (a) Card/Store: _____ (b) Name(s) on Account: _____ (c) Account # _____ (d) Minimum Monthly Payment: _____ (e) Current Account Balance: _____ (v) (a) Card/Store: _____ (b) Name(s) on Account: _____ (c) Account # _____ (d) Minimum Monthly Payment: _____ (e) Current Account Balance: _____						

DESCRIPTION	C/SS		Present Control		Desired Disposition	
	H	W	H	W	H	W
(vi) (a) Card/Store: _____ (b) Name(s) on Account: _____ (c) Account # _____ (d) Minimum Monthly Payment: _____ (e) Current Account Balance: _____						