

**CLIENT TO FILL OUT:**

**MATRIMONIAL INTAKE SHEET**

Today's Date: \_\_\_\_\_

**PARTIE'S INFORMATION** *All Info Requested MUST be provided – we are required to use it in various court documents, which is why it is requested.*

DATE MARRIED: \_\_\_\_\_ DATE SEPARATED: \_\_\_\_\_

*If currently residing together, so indicate*

CIVIL OR RELIGIOUS CEREMONY? \_\_\_\_\_

PLACE OF MARRIAGE (Village/City/Town and County/State) \_\_\_\_\_

Number of **Wife's** previous marriages \_\_\_\_\_ Grounds \_\_\_\_\_

Previous Married Name(s): \_\_\_\_\_

Number of **Husband's** previous marriages \_\_\_\_\_ Grounds \_\_\_\_\_

**PREVIOUS FAMILY COURT ORDERS?**

Custody/Visitation: \_\_\_\_\_ County: \_\_\_\_\_

Date(s): \_\_\_\_\_

Child Support: \_\_\_\_\_ County: \_\_\_\_\_

Date(s): \_\_\_\_\_

**CHILDREN OF MARRIAGE:** *We NEED Social Security Numbers for Court Papers*

| <u>NAME</u> | <u>DOB</u> | <u>CURRENT RESIDENCE</u> | <u>S.S.N #</u> |
|-------------|------------|--------------------------|----------------|
| _____       | _____      | _____                    | _____          |
| _____       | _____      | _____                    | _____          |
| _____       | _____      | _____                    | _____          |
| _____       | _____      | _____                    | _____          |
| _____       | _____      | _____                    | _____          |

**WIFE/SPOUSE #1 INFO** (DOB: \_\_\_\_\_); State of Birth: \_\_\_\_\_

\*\*\*Need photocopy of FRONT of Driver's License\*\*\*

**NAME** \_\_\_\_\_ **MAIDEN NAME(s)** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**EMAIL** \_\_\_\_\_

**Live in Village Limits?** \_\_\_\_\_ **If no: Towny/City of** \_\_\_\_\_.

**COUNTY OF RESIDENCE** \_\_\_\_\_

**PHONE** \_\_\_\_\_ **FAX** \_\_\_\_\_ **MOBILE** \_\_\_\_\_ **WORK** \_\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ ; Ethnicity \_\_\_\_\_

**AGE** \_\_\_\_\_ **HEALTH** (Excellent – Good – Fair – Poor) \_\_\_\_\_

**Highest Grade Completed:** \_\_\_\_\_

(specify degree, if any) \_\_\_\_\_

**EMPLOYER (name/address/contact info) & Occupation** \_\_\_\_\_

**INCOME (GROSS as per most recent Tax Year)** \_\_\_\_\_

***Stock/Savings/Pension Info Required ONLY if someone other than the named owner is keeping them***

**STOCK ACCOUNT(s) (Name/Account/Value):** \_\_\_\_\_

**SAVINGS ACCOUNT (Bank/Account/Value):** \_\_\_\_\_

**PENSION (date opened/current value/account info):** \_\_\_\_\_

**Wife's/Spouse#2 Vehicle (Make/Model/Year):** \_\_\_\_\_

**Amount owed** \_\_\_\_\_ **Value of Vehicle** \_\_\_\_\_

***Indicated Who's Name(s) are on title & car loan, if applicable***

**Separate Property: (owned prior to marriage or inherited during marriage):** \_\_\_\_\_

**HUSBAND'S /SPOUSE 2 INFO:** (DOB: \_\_\_\_\_); State of Birth: \_\_\_\_\_

\*\*\*Need photocopy of FRONT of Driver's License\*\*\*

**NAME** \_\_\_\_\_ **MAIDEN NAME(s)** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**EMAIL** \_\_\_\_\_

**Live in Village Limits?** \_\_\_\_\_ **If no: Towny/City of** \_\_\_\_\_.

**COUNTY OF RESIDENCE** \_\_\_\_\_

**PHONE** \_\_\_\_\_ **FAX** \_\_\_\_\_ **MOBILE** \_\_\_\_\_ **WORK** \_\_\_\_\_

**SOCIAL SECURITY NUMBER** \_\_\_\_\_ ; Ethnicity \_\_\_\_\_

**AGE** \_\_\_\_\_ **HEALTH** (Excellent – Good – Fair – Poor) \_\_\_\_\_

**Highest Grade Completed:** \_\_\_\_\_

(specify degree, if any) \_\_\_\_\_

**EMPLOYER (name/address/contact info) & Occupation** \_\_\_\_\_

**INCOME (GROSS as per most recent Tax Year)** \_\_\_\_\_

***Stock/Savings/Pension Info Required ONLY if someone other than the named owner is keeping them***

**STOCK ACCOUNT(s) (Name/Account/Value):** \_\_\_\_\_

**SAVINGS ACCOUNT (Bank/Account/Value):** \_\_\_\_\_

**PENSION (date opened/current value/account info):** \_\_\_\_\_

**Husband's/Spouse Vehicle (Make/Model/Year):** \_\_\_\_\_

**Amount owed** \_\_\_\_\_ **Value of Vehicle** \_\_\_\_\_

***Indicated Who's Name(s) are on title & car loan, if applicable***

**Separate Property: (owned prior to marriage or inherited during marriage):** \_\_\_\_\_

**MARITAL PROPERTY: (ANYTHING acquired during the course of the marriage regardless of who's name they are)**

**--Indicate whether jointly deeded and/or whether jointly financed & if not, specify name on deed & name on loan**

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**MARITAL ABODE (Place parties resided as husband/wife):** \_\_\_\_\_

→ **Indicate whether you OWEND or Rented this**

**MARITAL PROPERTY (address)** \_\_\_\_\_

Original Purchase Price: \_\_\_\_\_ Purchased when? \_\_\_\_\_

Approximate Value Now: \_\_\_\_\_

Amount Owed: \_\_\_\_\_

Who occupies H or W? \_\_\_\_\_

Name on Deed \_\_\_\_\_

Name on Mortgage \_\_\_\_\_

**\*\* Who is getting this or is it being sold?** \_\_\_\_\_

**OTHER REAL ESTATE (address/value(s) & indicate names on deed):** \_\_\_\_\_

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## **MEDICAL INSURANCE INFORMATION**

**WIFE/Spouse 1:** Covered by Medical \_\_\_\_\_ Dental \_\_\_\_\_ Prescription \_\_\_\_\_

Provider Name & Address on back of card: \_\_\_\_\_

\_\_\_\_\_

ID Number: \_\_\_\_\_ Plan Administrator: \_\_\_\_\_

**\*\*\*Need photocopy of back/front of cards\*\*\***

**HUSBAND/Spouse 2:** Covered by Medical \_\_\_\_\_ Dental \_\_\_\_\_ Prescription \_\_\_\_\_

Provider Name & Address on back of card: \_\_\_\_\_

\_\_\_\_\_

ID Number: \_\_\_\_\_ Plan Administrator: \_\_\_\_\_

**\*\*\*Need photocopy of back/front of cards\*\*\***

**CHILDREN:** Covered by Medical \_\_\_\_\_ Dental \_\_\_\_\_ Prescription \_\_\_\_\_

Provider Name & Address on back of card: \_\_\_\_\_

\_\_\_\_\_

ID Number: \_\_\_\_\_ Plan Administrator: \_\_\_\_\_

**\*\*\*Need photocopy of back/front of insurance cards\*\*\***

WHO Provides Health Insurance: \_\_\_\_\_

***Regardless of Which Plan – I need the cost of each IF you have children under 21yrs***

Cost of Individual Plan: \_\_\_\_\_ (specify week/biweekly)

Cost of Family Plan: \_\_\_\_\_ (specify week/biweekly)

**\*\* if no cost, please specify \*\***

**Addresses that any children of the marriage have had for the past five (5) years. If some children have had different addresses than others, please list separately.**

| Name(s) | Address | Lived with whom | Year(s) |
|---------|---------|-----------------|---------|
|         |         |                 |         |
|         |         |                 |         |
|         |         |                 |         |
|         |         |                 |         |

**Wife/Spouse: Addresses for past three (3) years:**

- 1.) \_\_\_\_\_
- 2.) \_\_\_\_\_
- 3.) \_\_\_\_\_

**Husband's/Spouse 2 Addresses for past three (3) years:**

- 1.) \_\_\_\_\_
- 2.) \_\_\_\_\_
- 3.) \_\_\_\_\_

**IF THERE IS NO CHILD SUPPORT ORDER:**

- 1) Who will be paying child support? \_\_\_\_\_
- 2) Will it be paid weekly, bi-weekly, or monthly? \_\_\_\_\_
- 3) How much will be paid? \_\_\_\_\_
- 4) Will the check be paid directly or through SCU (Support Collection Unit)? \_\_\_\_\_
- 5) How will uncovered medical expenses be paid? Each pay 50/50, 60/40, etc? \_\_\_\_\_  
\_\_\_\_\_
- 6) Who will claim dependent(s)? \_\_\_\_\_  
\_\_\_\_\_
- 7) If children go to college will parents be contributing a mandatory amount or be paying based upon what they can, if they can? \_\_\_\_\_
- 8) Extraordinary/Unforeseen Expenses, how will they be paid? Each pay 50/50, 60/40, etc? \_\_\_\_\_  
\_\_\_\_\_

## **AGREEMENT SHEET**

*Uncontested Divorce/Separation means Defendant will accept service & both parties will sign a written agreement before/after divorce is filed, agreeing on all the following issues:* **FILL IN TERMS OF AGREEMENT** – IF not applicable write “N/A” – if being waived write “waived” – if NO agreement write “NO AGREEMENT” & provide a separate list of all REQUESTS you are making with regard to every section that is applicable & for which there is no agreement.

**Grounds** for divorce, irretrievable breakdown *These are standard & will be the ground unless you have a signed Separation Agreement*

**Custody & Visitation** terms (under 18 yrs) – specify legal custody (joint or sole) and physical custody (*primary more than 50% with 1 parent or shared – same amount of time with each parent*) and parenting schedule, holiday schedule, vacations/etc (say not applicable if no kids under 18) (*times can be specific days/times/set or “as agreed”; holidays can be shared, alternated or “as agreed”, vacations/breaks to be shared or alternated or same as regular or certain #weeks/year? Etc*)

Joint LEGAL Custody or Sole LEGAL Custody (decision making custody):

*Times: same schedule year-round or is there a school year schedule & a summer schedule?*

Time to Mom:

Time to Dad:

Holidays:

Vacations:

Other Terms:

**Child Support** (under 21 yrs): your income, their income, amount to be paid for basic child support, specify amount to be paid & frequency -- weekly/bi-weekly/monthly – also who will carry insurance for the child(ren) – how will uncovered medical expenses be paid (% paid by whom)? – how will child care expenses be paid (% paid by whom)? Who is responsible for what? I would need both of your incomes & also need to know how much payor pays for family plan and what cost would be for individual. I have to show all calculations even if this is being waived. (If no kids under 21, say not applicable)

**Child Tax Exemption** - agree who claims or agree to alternate or split, etc. Need agreement details or state not applicable if no children are claimed *Each Claim A Child then alternate when one OR each and every year OR ONE claims every year?*

**Spousal Maintenance** -- agree higher monied spouse/spouse with highest income pays certain amount for certain period of time OR agree to waive, either way I have to show calculations, so I need everyone's income from previous year end.

You can use an online calculator to figure out amounts if you are curious as to what, if anything you MAY be entitled to – this is discretionary – use the POST-DIVORCE Maintenance/Child Support Calculator link:

[Maintenance & Child Support Tools | NYCOURTS.GOV](https://www.nycourts.gov/maintenance-child-support-calculator/)

[MatrimonialCalculator \(formsquo.com\)](https://www.formsquo.com/matrimonial-calculator/)

Waiting Maintenance?

Paying Maintenance? If so, how much?

**Retirement** -- agree to waive each other's retirements OR agree on how to divide them OR agree to have it calculated, normally spouse who wants portion pays to have this done & other spouse must sign/cooperate. Doesn't apply if already retired, this isn't split then. *IF you are wanting to collect on a PENSION, you reserve your right, but have to pay for a QDRO to be drafted (usually \$1500-\$2,500, NOT included in divorce) prior to retirement*



**Equitable Distribution** -- agree to equitably divide (not necessarily equally) all assets & debts acquired during the course of the marriage, regardless of who's name they are in -- (cars, houses, property, recreational vehicles, stocks, bank accounts, loans, credit cards, etc) List all major debts & how to divide or specify unresolved if not resolved – list all assets & how to divide, or list unresolved if not resolved – feel free to use a separate piece/pieces of paper:

**\*ITEMS THAT REQUIRE ATTACHED COPIES (Front& Back) \***

- **Driver's License (or Valid Government Issued I.D) (front)**
- **ALL Insurance cards (Husband, Wife, Children) (front & back)** – for everyone who has insurance if they are DIFFERENT cards