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Client Intake Questionnaire: General Dissolution

Please fill out this form to the best of your ability and provide all requested information. Doing so will save us time in preparing your case allowing us to focus on the legal analysis. **Not all information is required in every case.** If something does not apply to your situation, please cross out the section or simply move on to the next.

YOUR INFORMATION

Your Name: ____
First Middle Last

Do you have a maiden name? No

If yes, what is your maiden name? ______________________________

What is your current *physical* address?

____
Street Apt.?

____
City State Zip County

How long have you lived at this address? ____________________

Is your physical address the same as your *mailing* address? No

If no, what is your mailing address?

____
Street Apt.?

____
City State Zip County

Which telephone numbers can be used to reach you?

Home: (_____) _____ - ________ No
May a voicemail be left at this line?

Cell: (_____) _____ - ________ No
May a voicemail be left at this line?

What is your date of birth? _________________________

How old are you? _________

What is your social security number? ______ - ____ - ______

Do you wish to have your name changed as a part of the divorce? No

If yes, then please carefully print your desired legal name:

____
First Middle Last

SPOUSE INFORMATION

What is your spouse's name?

____
First Middle Last

What is their current *physical* address?

____
Street Apt.?

____
City State Zip County

How long has your spouse lived at this address? ____________________

Is their physical address the same as their *mailing* address? No

If no, what is their mailing address?

____
Street Apt.?

____
City State Zip County

What is your spouse's date of birth? ___________________

How old is your spouse? _______

What is your spouse's social security number? _____ - ___ - _____

Do you know if your spouse will be hiring an attorney? If so, do you know who the attorney will be?

____

MARRIAGE INFORMATION

When did you get married to your spouse? ___________________________

Where were you married? (City, County, and State)

____

Are you currently separated? No

If yes, when did you separate? ___________________________

Have either you or your spouse previously filed for divorce? No

If yes:

When was the action commenced? _________________________

Is that action still pending? No

Where was that action commenced (County and State)? _______________________

INCOME AND EMPLOYMENT

A. Your Employment and Income

Are you currently employed? No

If so, where are you employed? ______________________________

What do you do there? _____________________________________

What is your work address? ____

How long have you been employed at this job? _________________

Are you paid hourly, salary, or otherwise? _____________________

If hourly, what is your hourly wage? ______________

If hourly, how many hours per week do you work? ____________

If salary, what is your monthly income? ____________

B. Your Spouse's Employment and Income

Is your spouse currently employed? No

If so, where are they employed? ______________________________

What do they do there? _____________________________________

What is their work address? ____

How long have they been employed at this job? _________________

Are they paid hourly, salary, or otherwise? _____________________

If hourly, what is their hourly wage? ______________

If hourly, how many hours per week do they work? ____________

If salary, what is their monthly income? ____________

C. Insurance

Do you have health insurance? No

If yes, how are you insured? (i.e., privately, employer sponsored, state sponsored, etc.)

____

How much do you pay for health insurance? ____________

Is your spouse insured? No

If yes, how is your spouse insured? (i.e., privately, employer sponsored, state sponsored, etc.)

____

What is the cost of health insurance for ***only*** your spouse? ___________

E. Spousal Maintenance – **IF YOU ARE REQUESTING SPOUSAL MAINTENANCE (ALIMONY), PLEASE COMPLETE APPENDIX C, NECESSARY MONTHLY EXPENSES.**

CHECKING AND SAVINGS ACCOUNTS

Do you have any checking, savings, PayPal, Venmo, CashApp or similar accounts in your name, your children's names, or the name of your spouse?

No

If yes, please complete the chart below.

Account Name or Financial Institution	Last 4 Digits of Account Number	Type of Account	Approximate Value	Year Account Opened

RETIREMENT ACCOUNTS

Do you have any retirement accounts? No

If yes, please complete the chart below.

Account Name or Financial Institution	Last 4 Digits of Account Number	Type of Account	Approximate Value	Year Account Opened

Does your spouse have any retirement accounts? No

If yes, please complete the chart below to the best of your ability.

Account Name or Financial Institution	Last 4 Digits of Account Number	Type of Account	Approximate Value	Year Account Opened

POTENTIAL NON-MARITAL PROPERTY

Prior to your marriage did you and your spouse enter into an antenuptial (a/k/a prenuptial) agreement prior to your marriage? No

If yes, please provide a copy of the agreement when you return this questionnaire.

Did you or your spouse receive money or assets during your marriage from an inheritance? No

If yes, please describe the inheritance (include a description of the property, an approximate value of the property, and a description of when and how the property was acquired):

____

____

____

____

Did you or your spouse receive a gift to one of you but not the other from a third party, such as your parents or in-laws? No

If yes, please describe the gift (include a description of the property, an approximate value of the property, and a description of when and how the property was acquired):

____

____

____

____

Are you or your spouse beneficiaries of any trust? No

If you answered yes, please provide details of the award or trust benefits:

____

BUSINESS INTERESTS

Do you or your spouse have any business interests? No

If yes, **please complete Appendix D, Business Interests**.

LIFE INSURANCE

Do you or your spouse have any life insurance policies with cash value? No

If yes, **please complete Appendix E, Life Insurance**.

REAL ESTATE

Do you and/or your spouse own real estate? No

If yes, **please complete Appendix F, Real Estate**.

PERSONAL PROPERTY

Please detail your estimate of the fair market value of the following items, indicate who currently has possession of the items, and indicate to whom you believe the asset should be awarded.

Item	Who owns the property?	Who possesses the property?	Who should be awarded the property?
Household Contents			
Stocks and Bonds			
Securities			

Motor Vehicles

Year, Make, and Model	How is the vehicle titled?	Current Value	Lien amount, if any	Lien Holder	Monthly Payment	Who should keep?

Boats, Motors, Campers, Snowmobiles, Trailers, etc.

Year, Make, and Model	**How is the vehicle titled?**	**Current Value**	**Lien amount, if any**	**Lien Holder**	**Monthly Payment**	**Who should keep?**

Other valuable and/or important property: (i.e., power equipment, tools, guns, valuable animals, etc.)

Item Description	**Year Purchased**	**How titled**	**Current value**	**Lien Amount**	**In whose possession**	**Who should keep**

DEBTS

Secured Debts: (including, but not limited to car loans and real estate mortgages)

Creditor	Amount Owed	Monthly Payment	When Debt was Incurred	Debt in whose name?	Reason for debt	Collateral given	Who should pay?

Unsecured Debts: (credit cards, etc.)

Creditor	Amount Owing	Monthly Payment	When incurred	Debt in whose name?	Reason for debt	Who should pay?

Why do you believe the debts should be divided as you stated above? ________________

____

____

____

DOCUMENTS NEEDED

The following documents, if available, will help in the preparation of your case. Not all documents are available in every case, so please ask us about what might be most important to your case. We do not need these to start your file. Instead this is a list of things you should expect to provide to us during the course of working on your case, so we ask that you start compiling these things early in the process.

1. Your three (3) most recent pay stubs.
2. Your spouse's three (3) most recent pay stubs – *if you can get them*.
3. Your most recent tax return.
4. A copy of the deed(s) for all real estate you and/or your spouse own, if in your possession.
5. A copy of any lease agreement(s) for your current home if leased.
6. A copy of any appraisal(s) or other statements showing the value of any real estate, antiques, jewelry, or other valuable items of personal property owned by you and/or your spouse; and
7. A copy of your most recent statements for **ALL** 401(k); retirement plans; investment accounts; and bank accounts owned or possessed by you and/or your spouse.

Appendix C
Necessary Monthly Expenses

Expense	Your Current	Your Projected (post-divorce)	Children
Mortgage/Rent			
Insurance			
Real Estate Taxes			
Utilities			
Heat			
Food			
Clothing			
Laundry			
Medical			
Dental			
Car Payment			
Gasoline			
Car Insurance			
Car Maintenance			
Health Insurance			
Life Insurance			
Entertainment			
Charitable Giving			
Child care			
Home Maintenance			

School			
Allowances			
Credit Cards			
Bank Loans			
Other Loans			
Other (Please describe):			

Appendix D
Business Interests

Name of Business: ____

Is this business a: Limited Liability Company (LLC)

Percentage owned by you __________%. Percent owned by your spouse __________%.

Service or product provided: ____

Date business interest was acquired and extent of interest: ___________________________

Initial investment: _________________________

Position held: _____________________________

Names and address of all other shareholders, partners, or participants: __________________

____

____

____

If a corporation, what is you and/or your spouse's interest? ___________________________

Names and addresses of directors/officers and their respective titles: _____________

____

____

Does your spouse provide any services to this business? No

If yes, give detail: ____

____

____

Is your spouse compensated for the services rendered? No

If yes, give detail: ____

____

____

Have you and your spouse reached an agreement regarding the disposition of this business? No

Please describe your agreement or your proposal regarding the disposition of this business?

____

____

____

____

Appendix E
Life Insurance

Policy No. 1

Carrier: ____

Owner of Policy: ____________________ Policy No.: ______________

On the life of: ____

Face amount: $ __________________ Cash value: $ ______________

Are there loans against the account? No

If so, what is the amount of the loan(s)? $ ___________________________

Who are the beneficiaries of the account? ___________________________

____

Policy No. 2

Carrier: ____

Owner of Policy: ____________________ Policy No.: ______________

On the life of: ____

Face amount: $ __________________ Cash value: $ ______________

Are there loans against the account? No

If so, what is the amount of the loan(s)? $ ___________________________

Who are the beneficiaries of the account? ___________________________

____

Policy No. 3

Carrier: ____

Owner of Policy: ____________________ Policy No.: ______________

On the life of: ____

Face amount: $ _________________ Cash value: $ ______________

Are there loans against the account? No

If so, what is the amount of the loan(s)? $ ___________________________

Who are the beneficiaries of the account? ___________________________

____

Policy No. 4

Carrier: ____

Owner of Policy: ____________________ Policy No.: ______________

On the life of: ____

Face amount: $ _________________ Cash value: $ ______________

Are there loans against the account? No

If so, what is the amount of the loan(s)? $ ___________________________

Who are the beneficiaries of the account? ___________________________

____

Appendix F
Real Estate

Homestead (primary residence) address: ______________________________________

Legal description: ____

____

Is the property ☐ abstract or ☐ Torrens?

If Torrens, state Certificate of Title No. __________, and where the certificate is located:

____

Date purchased: ______________________

Purchase price: _______________________

Down payment: _______________________

Source of down payment: ____

In whose name is the property held? ____

Mortgage type (1st, 2nd, Home Equity Line of Credit, Etc.)	Mortgage Holder	Loan #	Original Balance	Current Balance

Contract for deed balance: $ ___________________

Owners of contract for deed: ____

Address: ____

What do you believe the home is worth? $ ____________________

What was the most recent tax assessed value? $ ________________ What year? ________

Monthly payment: $ _____________

Are the real estate taxes and/or insurance included in the mortgage or contract for deed payment?

☐ Taxes ☐ Insurance ☐ Neither

If no, are the real estate taxes and/ or insurance payments escrowed?

☐ Taxes ☐ Insurance ☐ Neither

If yes, where? ____

When is your homeowner's insurance due and payable? ______________________________

What is the cost of your homeowner's insurance per year? ___________________________

How much are the real estate taxes on the property per year? ___________________

When is your mortgage or contract for deed payment due? ___________________________

What major improvements have been made to the property since you purchased it? What was the cost of the improvements? Where did the funding for the improvements come from? Who has records of these improvements, if any records are available?

____

____

____

Have you and your spouse agreed on a way of distributing this property? No

Please describe your agreement or your proposal to distribute the property: ________

____

____

____

Please make copies of this addendum and complete for any additional properties owned.