

I. PERSONAL CONFIDENTIAL INFORMATION

A. Client

Full Legal Name

Formally Known As/Also Known as

Address

Phone Number

Email Address

Previous Marriages? If yes, list terminating event(s) and date(s):

Employer: _____

Position: _____

Annual Gross Pay \$ _____ Length of Employment: _____

Level of Education: _____

B. Fiance or partner

Full Legal Name

Formally Known as/Also Known as

Address

Phone Number

Email Address

Previous Marriages? If yes, list terminating event(s) and date(s):

Employer: _____

Position: _____

Annual Gross Pay \$ _____ Length of Employment: _____

Level of Education: _____

C. Child(ren)

Full Legal Name: _____

DOB: _____ SSN _____

Where does the child reside? _____

Name of Other Parent: _____

Full Legal Name: _____

DOB: _____ SSN _____

Where does the child reside? _____

Name of Other Parent: _____

Full Legal Name: _____

DOB: _____ SSN _____

Where does the child reside? _____

Name of Other Parent: _____

II. MARRIAGE/PRENUPTIAL AGREEMENT

What is today's date? _____

What is the expected date of marriage? _____

Where will the marriage take place? _____

Will you be the Husband or Wife in this marriage? _____

Have the wedding invitations been sent out? _____

What other plans have been made and/or carried out for the wedding? _____

Do you feel pressured in any way to enter into a prenuptial agreement? _____

The Prenuptial Agreement is desired by _____

Your main goals for the prenuptial agreement are as follows: (to separate inheritance or gifts; to address assets in the event of divorce; to address assets in the event of death; to provide spousal support, etc.) _____

How do your goals differ from your fiancé's goals? _____

What issues do you foresee with the negotiation of the prenuptial agreement? _____

Does your fiancé have an attorney? _____

If so, provide attorney contact information: _____

What decisions have you already made about your prenuptial agreement? _____

Has your intended spouse made any economic contributions to you (including supporting you while you pursued a professional interest)? _____

III.

SOURCES OF INCOME

Each person must make a full and complete financial disclosure to the other. The information contained in this form will be disclosed to the other spouse. If there are any assets not specifically identified in this form, please include those assets at the end.

For each source of income, whether salary, pension, dividends, interest, capital gains, trust, rent or other, please list the following:

Source: _____ Type: _____
Amount expected this year: \$ _____ Amount Last year: \$ _____
Amount one year ago: \$ _____ Significant change expected: _____

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Source: _____ Type: _____
Amount expected this year: \$ _____ Amount Last year: \$ _____
Amount one year ago: \$ _____ Significant change expected: _____

III. ASSETS

A. REAL PROPERTY

For any real property owned, whether a residence, investment/rental, unimproved land, farm or range, commercial property or vacation property, please list the following:

Type: _____ Address: _____
Date of Purchase _____ Purchase Price _____
Fair Market Value _____ Mortgage Balance _____
Title owners: _____

Type: _____ Address: _____
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Fair Market Value _____ Mortgage Balance _____
Title owners: _____

Type: _____ Address: _____
Date of Purchase _____ Purchase Price _____
Fair Market Value _____ Mortgage Balance _____
Title owners: _____

B. CASH ACCOUNTS

For any cash accounts, please list the following:

Type: _____ Bank: _____
Account # _____ Approximate Value _____
Title owner(s): _____

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Type: _____ Bank: _____
Account # _____ Approximate Value _____
Title owner(s): _____

For any cash accounts, please list the following:

Type: _____ Bank: _____
Account # _____ Approximate Value _____
Title owner(s): _____

C. RETIREMENT ACCOUNTS, STOCKS, BONDS, ANNUITIES & OTHER ACCOUNTS

For any retirement accounts, stocks, bonds, annuities and other accounts, please list the following:

Type: _____ Financial Institution _____
Account # _____ Approximate Value _____
Title Owner(s) _____

Type: _____ Financial Institution _____

Account # _____ Approximate Value _____

Title Owner(s) _____

Type: _____ Financial Institution _____

Account # _____ Approximate Value _____

Title Owner(s) _____

D. NOTES/ACCOUNTS RECEIVABLE

For all Notes and/or accounts receivable, please list the following:

Owed by: _____ Account # _____

Amount Due _____ Due Date _____

Purpose _____

Owed by: _____ Account # _____

Amount Due _____ Due Date _____

Purpose _____

Owed by: _____ Account # _____

Amount Due _____ Due Date _____

Purpose _____

E. LIFE INSURANCE

For all life insurance policies, please list the following:

Type: _____ Insurer _____

Title Owner: _____ Face Value _____

Beneficiaries: _____

Type: _____ Insurer _____

Title Owner: _____ Face Value _____

Beneficiaries: _____

Type: _____ Insurer _____

Title Owner: _____ Face Value _____

Beneficiaries: _____

F. BUSINESS INTERESTS

For any and all business interests, please list the following:

Name: _____ Type of Entity _____

State Organized _____ Ownership Interest _____

Estimated Value (if known) _____

N Name: _____ Type of
Entity _____

State Organized _____ Ownership Interest _____

Estimated Value (if known) _____

Name: _____ Type of Entity _____

State Organized _____ Ownership Interest _____

Estimated Value (if known) _____

G. OTHER PROPERTY

For all other property not listed above, please provide the following information:

Description: _____ Title Owner(s) _____

Fair Market Value _____

H. PETS AND OTHER ANIMALS

For all pets, please provide the following information:

Name of Pet: _____

Owner of Pet: _____

Type of animal: _____

IV. LIABILITIES/DEBTS

For all liabilities and/or debts, please list the following:

Type of Debt: _____

Financial Institution: _____

Account # _____

Debtor: _____

Type of Debt: _____

Financial Institution: _____

Account # _____

Debtor: _____

Type of Debt: _____

Financial Institution: _____

Account # _____

Debtor: _____

Type of Debt: _____

Financial Institution: _____

Account # _____

Debtor: _____

Agree upon what happens to your premarital property and postmarital appreciation, gains, income, rentals, dividends, and proceeds of such property:

Agree upon what happens to your postmarital property:

Determine ownership of your marital residence and secondary homes in the event of death or divorce

Provide how premarital and postmarital debts will be paid:

Discuss expectations of gifts and inheritances and how each will be treated:

Discuss expectations of trusts either spouse receives or benefits from, before, or after marriage:

Confirm the beneficiary of all 401(k), 403(b), profit-sharing, pension, IRA, and all other retirement plans, and state if such benefits will be divided:

Clarify what will happen to each type of property, whether jointly or individually owned:

Plan for alimony, maintenance, or spousal support, or provide for a waiver or property settlement instead of support

Identify your estate planning needs (e.g., wills, trusts, elective share, powers of attorney, healthcare proxy, and/or living will):

Identify medical, disability, life, or long-term care insurance coverage:

Identify your respective attorneys:

Determine what state's laws will apply and how your agreement will be affected by a move to another state (your attorney will advise you on this and help you to understand the law and its distinctions):

