

INFORMATION SHEET

Your Name: _____

Your Address: _____

Your Telephone No.: (Home) _____

(Work) _____

Your Date of Birth: _____

Date of Marriage: _____

Place of Marriage: _____

Date of Separation: _____

Names of Minor Children and Birthdates:

Your Spouse's Name: _____

Spouse's SS# _____

Spouse's Date of Birth: _____

Current Home Address and Work Address of Spouse:

List of Separate Property (Acquired Prior to Marriage and After Separation):

List of Community Property (Acquired During Marriage):

CLIENT DOCUMENT REQUEST

A complete picture of the assets and income of you and your spouse is absolutely necessary and, by providing us with the information and items requested below, *you will save time and money, as well as assist us in preparing the necessary legal papers.*

Note: "Value" refers to fair market value: the price one would obtain by sale of the particular asset in the current market.

The following items should be produced at the earliest opportunity:

1. Copies of your joint or individual income returns, both state and federal, for the past three years.
2. If you or your spouse have any interest in any business, business tax returns for the past three years.
3. Your paycheck stubs, from January 1 of the current year, if possible.
4. Your spouse's paycheck stubs, if you can get them from January 1 of the current year.
5. If there is a hearing for temporary support and maintenance scheduled in this matter, a wage statement from your employer for the 8-week period prior to the hearing will be needed for the hearing, in addition to tax returns requested.
6. A copy of any profit-sharing, investment, or pension plans you or your spouse may be involved in through the employer. By law it must be provided to you on request.
7. Copies of any financial or net worth statements that you have filed in the last five years for the purpose of securing a line of credit or otherwise. If you do not have the same in your possession, secure a copy from the holder or lending institution. Ownership of each asset listed on the statement and liability for obligations should be designated by (H) for husband, (W) for wife, (J) for jointly owned, or (C) for children.
8. Savings passbooks and savings certificates, owned by you and your spouse, individually or jointly. Also give name of stockbroker or brokers.
9. Copies of the current balance on deposit with any financial institutions, including but not limited to, savings and loan associations, or other financial institutions, including account number, and in whose name the account is held.
10. Title certificate to all automobiles or other motor vehicles owned by you or your spouse, individually or jointly. If title not available, then a full description of each vehicle.
11. Copies of the face sheets of all life insurance policies, with statements of loans against same. Provide the company name and policy or group number of all health and medical insurance, and obtain from the company a statement as to coverage for spouse and children and what provision, if any, the policy has concerning conversion after divorce.
12. Face sheets and schedules for any and all household insurance policies. Schedules should include furs, jewels, and any property listed of value.

- ___ 13. An inventory (by room) and an estimate of the value of your household furniture and furnishings and household contents. Normally, household furniture should be given a "garage sale" value unless it is of an antique or of special value. See Note above for definition of "value."
- ___ 14. Insurance appraisals of personal property.
- ___ 15. If there is any interest in an estate, a copy of the will, inventory, final accounts and judgment. As to trusts, a copy of the trust instrument, inventory and tax returns, if any, for the trust for the past three years.
- ___ 16. With respect to each parcel of real estate, the address and a copy of the legal description which will appear on the deed, mortgage, and title insurance. *It is imperative* that we have a complete legal description for each parcel of real estate. A copy of the deed, mortgage, or title insurance may be secured from the lending institution on your request.
- ___ 17. Mortgage or contract for loans on your home, and any other real estate. Bring the last monthly mortgage payment statement if you have it.
- ___ 18. A copy of the last real estate tax bill for each parcel of real estate. (This may be obtained through city assessor.) If any of this property has been appraised, for any reason (*i.e.*, insurance, mortgage loans, contemplation of sale), copies of each appraisal.
- ___ 19. A copy of your stock brokerage account statement, and of stock certificates, bonds, and all other securities owned by you and your spouse, individually or jointly, and name of broker or brokers. If you are unable to obtain copies, then furnish us with names of the companies, type of security, and the name of the broker through whom you do business.
- ___ 20. A list of all outstanding bills owed by you or your spouse individually or jointly, along with copies of the most recent billings on the accounts.
- ___ 21. If either spouse was previously married and divorced or separated, copies of Findings of Fact and Conclusions of Law and/or the Judgment of Divorce or Judgment of Legal Separation.
- ___ 22. Any other information that will help establish your net worth, your spouse's net worth, your joint net worth, your income, and your spouse's income.

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If you are unable to obtain copies of any of the above, please bring the items with you when you come to this office and we will reproduce them.