



**CURRENT ESTATE PLAN**

Do you have a will or a trust?  Yes  No  
Do you have a power of attorney or health care directive?  Yes  No

**PRIOR LITIGATION**

Has either spouse previously filed for divorce in this county or elsewhere?  
 Yes Indicate when and where filed, status of case, case number, and name of judge. \_\_\_\_\_  
 No \_\_\_\_\_

Has there been any previous domestic relations or domestic violence case filed in this county or elsewhere involving you and/or your spouse or any other family member?  
 Yes Indicate when and where filed, status of case, case number, and name of judge. \_\_\_\_\_  
 No \_\_\_\_\_

**FAMILY HEALTH AND SOCIAL ISSUES**

Do you or your spouse have  
• any serious physical or mental disability, disorder, handicap or incurable disease?  
 No  Yes Please explain. \_\_\_\_\_  
• any problems with substance abuse (drugs, alcohol)?  
 Yes What type of drugs? \_\_\_\_\_  
What treatment and by whom? \_\_\_\_\_  
When? \_\_\_\_\_  
Place of treatment \_\_\_\_\_  
 No

What physical abuse, if any, has occurred and on what dates? \_\_\_\_\_

Has either spouse ever been arrested, convicted, imprisoned, or placed on probation?  
 No  Yes Explain. \_\_\_\_\_

Any particular interest in another person by either party \_\_\_\_\_  
Any problems with debts \_\_\_\_\_ Gambling \_\_\_\_\_  
Any marriage counseling \_\_\_\_\_  
Personal counseling (yours/spouse's) \_\_\_\_\_  
Would you begin or continue counseling? \_\_\_\_\_

Attitudes (yours/spouse's) toward reconciliation \_\_\_\_\_  
Are you or your spouse receiving ADC?  
 No  Yes Caseworker \_\_\_\_\_ Case no. \_\_\_\_\_

**PHYSICAL INFORMATION**

**Physical Description of Client:**

Race \_\_\_\_\_ Height \_\_\_\_\_ Weight \_\_\_\_\_ Eye color \_\_\_\_\_ Hair color \_\_\_\_\_  
Glasses  No  Yes Worn all the time?  Yes  No  
Mustache/beard  No  Yes Color \_\_\_\_\_  
Distinguishing scars or tattoos \_\_\_\_\_  
Any current restraining orders? \_\_\_\_\_

**Physical Description of Spouse:**

Race \_\_\_\_\_ Height \_\_\_\_\_ Weight \_\_\_\_\_ Eye color \_\_\_\_\_ Hair color \_\_\_\_\_  
Glasses  No  Yes Worn all the time?  Yes  No  
Mustache/beard  No  Yes Color \_\_\_\_\_  
Distinguishing scars or tattoos \_\_\_\_\_  
Any current restraining orders? \_\_\_\_\_

**EMPLOYMENT**

*Client*  
Employer \_\_\_\_\_  
Address \_\_\_\_\_

*Spouse*  
Employer \_\_\_\_\_  
Address \_\_\_\_\_

Date of hire \_\_\_\_\_  
Occupation \_\_\_\_\_  
Weekly gross pay \_\_\_\_\_  
Weekly take home \_\_\_\_\_  
Pension \_\_\_\_\_  
Early retirement benefits \_\_\_\_\_  
Signing bonus or any special payment \_\_\_\_\_  
Profit-sharing \_\_\_\_\_  
Recognition or other awards \_\_\_\_\_  
Income last year \_\_\_\_\_

Date of hire \_\_\_\_\_  
Occupation \_\_\_\_\_  
Weekly gross pay \_\_\_\_\_  
Weekly take home \_\_\_\_\_  
Pension \_\_\_\_\_  
Early retirement benefits \_\_\_\_\_  
Signing bonus or any special payment \_\_\_\_\_  
Profit-sharing \_\_\_\_\_  
Recognition or other awards \_\_\_\_\_  
Income last year \_\_\_\_\_

**Please attach a copy of your last 3 pay stubs.** Indicate if any deductions are mandatory (other than taxes), for example, union dues, pension, etc. Please attach the last 2 income tax returns (personal and business) with their schedules and W-2 forms.

Previous employer \_\_\_\_\_  
Address \_\_\_\_\_  
Annual income \_\_\_\_\_

Previous employer \_\_\_\_\_  
Address \_\_\_\_\_  
Annual income \_\_\_\_\_

Other income sources (pension, retirement, public assistance or ADC, veterans' benefits, Social Security, annuity funds):

1. Type (wage/dividend) \_\_\_\_\_  
Gross per year \_\_\_\_\_ In whose name \_\_\_\_\_
2. Type (wage/dividend) \_\_\_\_\_  
Gross per year \_\_\_\_\_ In whose name \_\_\_\_\_

**EDUCATION**

*Client*  
Highest degree obtained \_\_\_\_\_  
High school \_\_\_\_\_  
Date of diploma or GED \_\_\_\_\_  
Univ./College \_\_\_\_\_  
Degree \_\_\_\_\_  
Date obtained \_\_\_\_\_  
Univ./College \_\_\_\_\_  
Degree \_\_\_\_\_  
Date obtained \_\_\_\_\_  
Additional training \_\_\_\_\_

*Spouse*  
Highest degree obtained \_\_\_\_\_  
High school \_\_\_\_\_  
Date of diploma or GED \_\_\_\_\_  
Univ./College \_\_\_\_\_  
Degree \_\_\_\_\_  
Date obtained \_\_\_\_\_  
Univ./College \_\_\_\_\_  
Degree \_\_\_\_\_  
Date obtained \_\_\_\_\_  
Additional training \_\_\_\_\_

Did either spouse contribute to the education of the other?  
[ ] Yes Describe. \_\_\_\_\_  
[ ] No

**ASSETS**

*(Attach additional sheets if necessary.)*

**A. Real property. Attach copies of deeds or land contracts for all property.**

1. Resident address \_\_\_\_\_  
Date purchased \_\_\_\_\_ Purchase price \_\_\_\_\_ Mortgage co. \_\_\_\_\_  
Account no. \_\_\_\_\_ In whose name \_\_\_\_\_  
Monthly payments \_\_\_\_\_ Balance due \_\_\_\_\_ Paid by [ ] Husband [ ] Wife [ ] Both  
What is the fair market value of property? \_\_\_\_\_  
**Please attach a copy of last property tax bill.** Amount of property taxes \_\_\_\_\_  
Are they included in monthly payment? \_\_\_\_\_

2. Additional real estate  
 Address \_\_\_\_\_  
 Date purchased \_\_\_\_\_ Purchase price \_\_\_\_\_ Mortgage co. \_\_\_\_\_  
 Account no. \_\_\_\_\_ In whose name \_\_\_\_\_  
 Monthly payments \_\_\_\_\_ Balance due \_\_\_\_\_ Paid by  Husband  Wife  Both  
 What is the fair market value of property? \_\_\_\_\_  
**Please attach a copy of last property tax bill.** Amount of property taxes \_\_\_\_\_  
 Are they included in monthly payment? \_\_\_\_\_

**B. Vehicles (car, boat, trailer, motorcycle, snowmobile, etc.)**

1. Year/make \_\_\_\_\_  
 Vehicle identification number \_\_\_\_\_  
 In whose name \_\_\_\_\_ Possession \_\_\_\_\_ Miles/Condition \_\_\_\_\_  
 Purchase price \_\_\_\_\_ Monthly payments \_\_\_\_\_  
 Lien holder \_\_\_\_\_ Balance due \_\_\_\_\_  
 Approximate value of car \_\_\_\_\_

2. Year/make \_\_\_\_\_  
 Vehicle identification number \_\_\_\_\_  
 In whose name \_\_\_\_\_ Possession \_\_\_\_\_ Miles/Condition \_\_\_\_\_  
 Purchase price \_\_\_\_\_ Monthly payments \_\_\_\_\_  
 Lien holder \_\_\_\_\_ Balance due \_\_\_\_\_  
 Approximate value of car \_\_\_\_\_

3. Year/make \_\_\_\_\_  
 Vehicle identification number \_\_\_\_\_  
 In whose name \_\_\_\_\_ Possession \_\_\_\_\_ Miles/Condition \_\_\_\_\_  
 Purchase price \_\_\_\_\_ Monthly payments \_\_\_\_\_  
 Lien holder \_\_\_\_\_ Balance due \_\_\_\_\_  
 Approximate value of car \_\_\_\_\_

4. Year/make \_\_\_\_\_  
 Vehicle identification number \_\_\_\_\_  
 In whose name \_\_\_\_\_ Possession \_\_\_\_\_ Miles/Condition \_\_\_\_\_  
 Purchase price \_\_\_\_\_ Monthly payments \_\_\_\_\_  
 Lien holder \_\_\_\_\_ Balance due \_\_\_\_\_  
 Approximate value of car \_\_\_\_\_

5. Year/make \_\_\_\_\_  
 Vehicle identification number \_\_\_\_\_  
 In whose name \_\_\_\_\_ Possession \_\_\_\_\_ Miles/Condition \_\_\_\_\_  
 Purchase price \_\_\_\_\_ Monthly payments \_\_\_\_\_  
 Lien holder \_\_\_\_\_ Balance due \_\_\_\_\_  
 Approximate value of car \_\_\_\_\_

**C. Bank accounts or credit union accounts**

1. Name of bank and branch \_\_\_\_\_  
 Account number \_\_\_\_\_  
 Type of account (savings, checking, money market) \_\_\_\_\_  
 Signatories \_\_\_\_\_  
 Source of monies \_\_\_\_\_ Balance \_\_\_\_\_

2. Name of bank and branch \_\_\_\_\_  
 Account number \_\_\_\_\_  
 Type of account (savings, checking, money market) \_\_\_\_\_  
 Signatories \_\_\_\_\_  
 Source of monies \_\_\_\_\_ Balance \_\_\_\_\_

3. Name of bank and branch \_\_\_\_\_  
 Account number \_\_\_\_\_  
 Type of account (savings, checking, money market) \_\_\_\_\_  
 Signatories \_\_\_\_\_  
 Source of monies \_\_\_\_\_ Balance \_\_\_\_\_

**D. Individual retirement accounts**

- 1. Financial institution \_\_\_\_\_  
Account number \_\_\_\_\_ Balance \_\_\_\_\_ In whose name \_\_\_\_\_
- 2. Financial institution \_\_\_\_\_  
Account number \_\_\_\_\_ Balance \_\_\_\_\_ In whose name \_\_\_\_\_

**E. Retirement plans, pensions, Keoghs, 401(k) plans, profit-sharing plans, stock bonus or option plans, etc. (attach copies of plan descriptions and annual reports for each)**

- 1. Employer or financial institution \_\_\_\_\_  
Name and type of plan \_\_\_\_\_ Vested \_\_\_\_\_  
Value \_\_\_\_\_ Account no. \_\_\_\_\_ In whose name \_\_\_\_\_
- 2. Employer or financial institution \_\_\_\_\_  
Name and type of plan \_\_\_\_\_ Vested \_\_\_\_\_  
Value \_\_\_\_\_ Account no. \_\_\_\_\_ In whose name \_\_\_\_\_
- 3. Employer or financial institution \_\_\_\_\_  
Name and type of plan \_\_\_\_\_ Vested \_\_\_\_\_  
Value \_\_\_\_\_ Account no. \_\_\_\_\_ In whose name \_\_\_\_\_

**F. Corporate stocks, bonds, notes, securities, bills, brokerage accounts**

- 1. Name of broker and firm holding investments \_\_\_\_\_  
Type of investment \_\_\_\_\_  
Account no. \_\_\_\_\_ In whose name \_\_\_\_\_  
Type of account (savings, checking, money market) \_\_\_\_\_  
Purchase price \_\_\_\_\_ Current value \_\_\_\_\_  
What was source of stock or funds to purchase? \_\_\_\_\_

**G. Patents, inventions, copyrights, etc.**

\_\_\_\_\_  
\_\_\_\_\_

**H. Life insurance**

<p><i>Client</i></p> <p>Name of insurer _____</p> <p>Name of insured _____</p> <p>Name of beneficiary _____</p> <hr/> <p>Type of insurance (term, whole life, etc.) _____</p> <p>Policy no. _____</p> <p>Amount of policy _____</p> <p>Cash surrender value _____</p> <p>Loans against policy _____</p>	<p><i>Spouse</i></p> <p>Name of insurer _____</p> <p>Name of insured _____</p> <p>Name of beneficiary _____</p> <hr/> <p>Type of insurance (term, whole life, etc.) _____</p> <p>Policy no. _____</p> <p>Amount of policy _____</p> <p>Cash surrender value _____</p> <p>Loans against policy _____</p>
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**I. Business interests (corporations, partnerships, sole proprietorships, etc.)**

Name and type of business interest \_\_\_\_\_

Type of ownership interest \_\_\_\_\_

Value of interest \_\_\_\_\_

Initial investment and when \_\_\_\_\_

Additional amounts invested and when \_\_\_\_\_

**J. Community property (property acquired with your spouse)**

Have you ever lived in a state which has a community property law (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, or Wisconsin)?

- Yes Provide details and the status of assets brought into this state. \_\_\_\_\_
- No

**K. Miscellaneous assets**

Please describe any miscellaneous assets you or your spouse have, such as jewelry or collectibles, that have any significant monetary or emotional value: \_\_\_\_\_

\_\_\_\_\_

**L. Gifts**

Have you or your spouse made any substantial gifts in the past or placed property in joint names with anyone other than the spouse?

- Yes Provide details. \_\_\_\_\_
- No

**M. Trust beneficiaries**

Are you or your spouse the beneficiary under any trust?

- Yes Provide details. \_\_\_\_\_
- No

**N. Please list any significant assets or debts either you or your spouse had at the time of marriage.**

\_\_\_\_\_

\_\_\_\_\_

**O. Are you aware of assets being given away, sold, or hidden from you?**

- Yes Briefly explain. \_\_\_\_\_
- No

**LIABILITIES**

Please indicate with an asterisk any accounts that you have reason to believe are delinquent.

Indebtedness (i.e., credit cards, educational loans, personal loans, etc.)

1. Creditor \_\_\_\_\_ Account no. \_\_\_\_\_  
Type of indebtedness (credit card, etc.) \_\_\_\_\_ Is the account current?  Yes  No  
Present balance due \_\_\_\_\_ Monthly payment \_\_\_\_\_  
Named borrowers \_\_\_\_\_  
Who will pay until the divorce judgment? \_\_\_\_\_
2. Creditor \_\_\_\_\_ Account no. \_\_\_\_\_  
Type of indebtedness (credit card, etc.) \_\_\_\_\_ Is the account current?  Yes  No  
Present balance due \_\_\_\_\_ Monthly payment \_\_\_\_\_  
Named borrowers \_\_\_\_\_  
Who will pay until the divorce judgment? \_\_\_\_\_
3. Creditor \_\_\_\_\_ Account no. \_\_\_\_\_  
Type of indebtedness (credit card, etc.) \_\_\_\_\_ Is the account current?  Yes  No  
Present balance due \_\_\_\_\_ Monthly payment \_\_\_\_\_  
Named borrowers \_\_\_\_\_  
Who will pay until the divorce judgment? \_\_\_\_\_
4. Creditor \_\_\_\_\_ Account no. \_\_\_\_\_  
Type of indebtedness (credit card, etc.) \_\_\_\_\_ Is the account current?  Yes  No  
Present balance due \_\_\_\_\_ Monthly payment \_\_\_\_\_  
Named borrowers \_\_\_\_\_  
Who will pay until the divorce judgment? \_\_\_\_\_
5. Creditor \_\_\_\_\_ Account no. \_\_\_\_\_  
Type of indebtedness (credit card, etc.) \_\_\_\_\_ Is the account current?  Yes  No  
Present balance due \_\_\_\_\_ Monthly payment \_\_\_\_\_  
Named borrowers \_\_\_\_\_  
Who will pay until the divorce judgment? \_\_\_\_\_

Delinquent indebtedness

Mortgage \_\_\_\_\_ How much? \_\_\_\_\_ How long overdue? \_\_\_\_\_

Property \_\_\_\_\_ How much? \_\_\_\_\_ How long overdue? \_\_\_\_\_

Income taxes \_\_\_\_\_ How much? \_\_\_\_\_ How long overdue? \_\_\_\_\_

Vehicle loan \_\_\_\_\_ How much? \_\_\_\_\_ How long overdue? \_\_\_\_\_

Other \_\_\_\_\_ How much? \_\_\_\_\_ How long overdue? \_\_\_\_\_

Business debts

What kind? \_\_\_\_\_ How much? \_\_\_\_\_ How long overdue? \_\_\_\_\_

Other obligations (for example, spousal support to a former spouse) \_\_\_\_\_

Is anyone other than the spouse financially dependent on you?

Yes Give details. \_\_\_\_\_

No

On your spouse?

Yes Give details. \_\_\_\_\_

No

**WHAT ARE YOUR GOALS IN THIS CASE?**

Divorce

Spousal support \_\_\_\_\_

Spouse to vacate home \_\_\_\_\_

Contribution to your attorney fees \_\_\_\_\_

Restoration of former name \_\_\_\_\_

Property division

Domestic abuse injunction

Health insurance \_\_\_\_\_

Mortgage payments \_\_\_\_\_

Debts \_\_\_\_\_

Other \_\_\_\_\_

**PLEASE GIVE A BRIEF SUMMARY OF WHAT YOU THINK A FAIR SETTLEMENT WOULD BE:**

## DOCUMENTS REQUESTED

All of the items below are needed to complete your divorce case file if they apply to your case. Bring in copies or originals as soon as possible.

### *Items needed*

- Tax returns with schedules and W-2s -- last two years
- Paycheck stubs -- last two months:  You  Your spouse
- Mortgage statement

### Document showing legal description

- Marital home
- Vacation property
- Income property
- Last property tax bills for each property
- Pension or retirement account statement:  You  Your spouse
- Car titles  You  Your spouse
- Life insurance cash value statement
- Savings account statements
- Investment account balance statements
- Appraisal for any real estate
- Prenuptial or postnuptial agreement
- Latest credit card or other debt statements
- \_\_\_\_\_