### CLIENT INFORMATION

It is important that you fill out in as much detail as possible all of the following. Every item must be answered, even if it is with the word "None", if none exist.

You must fill in this form and <u>sign</u> and <u>date</u> it on the last page after completing, and return it to me.

Client's name:	Social Security Number:	
Maiden name:	Wife's Maiden Name:	(if applicable)
Maiden or former name to be resumed: Yes	No □	
Current Address:		
Mailing Address, if Different:		
Age at marriage:	Your Date of Birth:	,
Spouse's name and address:	Spouse's Date of Birth:	
Any criminal record? Yes No Client or Spany pending Restraining Orders?  If so, Name of Court where issued (attach a copy of Date of Marriage:		
Month, Day, Year	Town/City	State
Date of present separation:	Any previous separations: Yes	□ No □
Address last lived together:	If so, please state dates and dur	ation of separation.

Name(s) of Children of Marriage	Age	Date of Birth	Parent Child Living With	Grade in School
s				
Do you have any natural, ac your household half the time	iopted, stepch e or more? Y	illdren, foster childre (es □ No □	en or children of parti	ners who are living in
If so, how many children (p.	lease give nam	es and ages):	•	
Do you receive any support	or payment to	help defray their e	kpenses? Yes 🗍 No	· 🗆
Do you have any other perso	n who resides	in your household?	Yes 🗌 No 🗍	
If so, please describe the indipayment of the household ex	ividual(s), thei penses are.	r name, relationship	to you, and what the	eir contribution to the
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### CLIENT'S EMPLOYMENT INFORMATION

Your Occupation:	
Your Primary Employer:	
Address:	
Telephone Number:	
Wages:	
Please check how paid:	No. of Exemptions claimed:
Weekly 🗀 Bi-weekiy 🗀	Gross Amount Paid
Monthly ☐ Bi-monthly ☐	Per Pay Period: (Amount before Deductions)
Salary  Hourly	
Do you have any other job or source of income?	Explanation Please describe second
If so, please specify employer or second job:	source of income:
Address of employer or second job:	
Wages received from second job:	

Payroll Deductions:	Yes	No	Amount of Deduction If Known
Federal Tax Withholding:			\$
State Tax Withholding:			\$
F.I.C.A.:			\$
Medicare:			\$
Medical Insurance::			\$
Dental Insurance:			\$
Union Dues:			\$
Child Support:			\$
Spousal Supports		2	\$
Retirement: - 401(k) Plan: - Ordinary Retirement Plan: - Stock Option: - Stock Purchase Plan:		□	\$
Savings:	Ξ	$\Box$	\$
Deferred Compensation:			\$
Credit Union (Loan):		<u> </u>	\$
Credit Union (Savings):	Ξ		\$
Charitable Contributions:			\$
Life Insurance:			\$
Other (specify):			\$
Other (specify):			\$
Other (specify):		<del>[                                    </del>	¢,

Available through Your Employment (Please check the ones that apply)	Yes	No	
Bonuses and Commissions:			
Cost of Living:			
Disability Insurance:			
Reimbursement of Expenses including travel and meals:			
Company Car Provided:			
Auto Expenses Reimbursed:			
Educational Benefits:			
	•		

Gross Income from Prior Year: (Attach copy of all W-2 and 1099 Forms for prior year)

If Self-employed, see Schedule A attached, and provide information including your most recent business financial statement and tax return.

Do you pay or receive (circle the appropriate response) alimony or child support from or pay to a former spouse for self or children?

If so, please state the amount paid or received and provide a copy of the Court Order or Agreement whose terms direct the payment.

### TO THE EXTENT YOU KNOW SPOUSE'S EMPLOYMENT INFORMATION PLEASE PROVIDE

Spouse's Employer: No. of Exemptions Claimed: Name: Address: Work Hours: Overtime: Anticipated promotions, raises and bonuses: How long employed: Yes 🗀 No 🗔 Unknown: 🗀 Nature of Job: Gress Amount: \_\_\_\_ (Amount before Deductions) Salary Hourly Hourly When Paid: Benefits: Bonuses, Commissions, Cost of Living: Retirement, Pension, Disability Insurance: Expense Account: Medical Insurance: Auto Loan or Other Loan at Work: Company Car or Auto Expenses Provided: Stocks, Bonds: Educational Benefits: Other Benefits and/or Deductions at Work i.e., Thrift Plan or Savings: Other income from any source: Yes 
No

Spouse's Employment Information (Cont.)	
Jobs, rental income:	
Interests, dividends, trusts:	
Social Security, veterans:	
Unemployment, welfare, etc.:	
Disability or other income:	
Support payments from prior marriage:	
Certificate No.	NSURANCE INFORMATION  Master Medical Yes  No
Is it through employment? Yes ☐ No ☐	
Dental Plan: Yes No	
If more than one policy, state same informa	tion as above:
Cert. No.:	Name:
Cert. No.:	Name:
Who pays the premium?	What is premium, if you know?

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### LIFE INSURANCE INFORMATION

Policy 1	Policy 2
Name of Company	Name of Company:
Policy No.	Policy No.
Type of Insurance: (Whole, Term, etc.)	Type of Insurance: (Whole, Term, etc.)
Insured:	Insured:
Cash Surrender Value:	Cash Surrender Value:
Loan Against Cash Surrender Value:	Loan Against Cash Surrender Value:
Death Benefit Amount:	Death Benefit Amount:
How Long Been Paying:	How Long Been Paying:
Beneficiary and whether revocable: Yes \( \sum \) No \( \sum \)	Beneficiary and whether revocable: Yes No No Name:
Оwлег:	Owner:
Who holds policy:	Who holds policy:
Who Pays Premiums:	Who Pays Premiums:
If more than two policies places	use additional paper and attach

If more than two policies, please use additional paper and attach.

Please be sure to list all information as required above.

### REAL ESTATE INFORMATION

### Property No. 1

Description of Real Estate: Example - Single-family house, marital domicile, etc.

Location (Street Address, Town and State):
Title in whose name:
Year of Purchase:
Original Purchase Price:
Amount of Down Payment:
Source of Down Payment: Example - Sale of prior house, gift, savings, etc.
Present Assessed Value by City or Town:
Date of Last Assessment:
Present Estimated Fair Market Value: \$
Amount of Present  Balance on Mortgage(s):
Name of Bank or persons holding mortgage(s):
Who presently occupies the house?
Any Rental Income Associated with House? Yes 🗌 No 🗀
How much per month? \$ Are Utilities Included? Yes □ No □

### Property No. 2

Description of Real Estate: Example - Single-family house, summer home, rental property, etc.

Location (Street Address, Town and State):	
Title in whose name:	
Year of Purchase:	
Original Purchase Price:	
Amount of Down Payment:	
Source of Down Payment: Example - Sale of prior house, gift; s	savings, etc.
Present Assessed Value by City or Town:	
Date of Last Assessment:	
Present Estimated Fair Market Value: \$	
Amount of Present Balance on Mortgage(s):	
Name of Bank or persons holding mortgage(s):	
Who presently occupies the house?	
Any Rental Income Associated with House? Yes 📃 No 📃	
How much per month? \$ A	Are Utilities Included? Yes 🗆 No 🗔
If more than two policies, please use addi	tional paper and attach.

Please be sure to list all information as required above.

### MOTOR VEHICLE INFORMATION

(These include automobiles, trucks, ATV's, snowmobiles, tractors, motorcycles, boats, recreational vehicles, aircraft or farm machinery)

### Vehicle 1

		•
Year, Make and Model:		
Purchase Price of Vehicle:	•	
Year of Purchase:		
Fair Market Value:		
Outstanding Loan:		
Equity:		
Who Currently has Possession:		
Who Currently Insures and Maintains:		
Who Holds Title:		
Year, Make and Model:	Vehicle 2	
Purchase Price of Vehicle:		
Year of Purchase:		
Fair Market Value:		
Outstanding Loan:		
Equity:		
Who Currently has Possession:		
Who Currently Insures and Maintains:		
Who Holds Title:		

### Vehicle 3

Year, Make and Model:	 	 	<del></del> -
Purchase Price of Vehicle:	 		
Year of Purchase:	'		
Fair Market Value:			
Outstanding Loan:			
Equity:			
Who Currently has Possession:			
Who Currently Insures and Maintains:	 	 	·
Who Holds Title:			

### PENSION INFORMATION

	Institution Name of Company.	Account Number	Listed Beneficiary In Event of Your Death	Current Balance/Value
Defined Benefit Plan		and the state of t		
Defined Contribution Plan				

# OTHER ASSET INFORMATION

and account number(s), owners or beneficiaries and current balances, If applicable, List assets which are held individually, jointly, in the name of another person for your benefit, or held by you for the benefit of your minor child (ren), List particulars as indicated, e.g., name(s) of bank or company

	Name of Bank	Account Number	Names of Owner or Beneficiary	Current Balance
Checking Account				
Checking Account				
Savings Account				
Savings Account				
Savings Account				
С				
Certificate of Deposit				

		•		
	Name of Bank	Account	Names of Owner or Beneficiary	Current Balance
Certificate of Deposit				
Credit Union Account				
Credit Union Account				
Funds Held in Escrow				
Stocks				
Cash in Brokerage Account(s)				
Money Market Account(s)				
IRA's				
Keough				

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				;
	Name of Bank	A <u>c</u> count Number	Names of Owner or Beneficiary	Current Balance
Profit Sharing				
Deferred Compensation				
Other Rettrement Plans				
Annuity (please specify whether a tax deferred annuity or a tax sheltered annuity).				
Life Insurance Cash Value (please specify whether a term or a whole/universal life insurance policy).				
Judgments/Liens by which you are owed money				
Pending Legacies and/or inheritances		7		
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	Name of Bank	Account Number	Names of Owner or	Current Balance
			beneficiary.	
Contents of Safe or Safe Deposit Box				
Collections				
Tools/Equipment				
Crops/Livestock				
Fome Furnishings (value)				
Art and Antiques				
Other (specify)				
Other (specify)			, sa	
Other (specify)				
		I		

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## LIABILITY INFORMATION

(List loans, credit card debt, consumer debt, installment debt, etc., which are not listed elsewhere.)

	<del></del>	 	. <del></del>	 	·
Monthly. Payment					
Who Current Pays?					
Present. Balance Owed					
Original Amount					
Otiginal Date of Debt					
Reason for Debt, i.e. clothes, loan, car, etc.				,	
To Whom Owed (Creditor)			:		

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### DETAIL CREDIT CARD STRUCTURE

Does spouse have authority to change your name: Yes	] No []
Who has possession of above cards: I do 🗌 Spouse do	es 🗍 Both 🗍
Have any credit cards been canceled? Yes ☐ No ☐	
If answer is yes, list names of credit cards:	
Religion: Pa	articipation: Active 🗀 Non-Active 🖂
Educational background and training:	
Client:	
Spouse:	:
Are parties presently in good health? Yes 🗆 No 🗆	3
Any serious illness, operations, diseases for either:	
Any history of mental illness in parties, children, family:	
Ever any suicide attempts by the parties?	
Did the parties ever attend any marriage or other counseling	?
Name of counselor:	Address:
Number of sessions:	
Who attended:	
Who suggested:	
Either or both presently attending:	
Any children who died after birth:	
Any pregnancies interrupted for any reason:	

Does client anticipate custody o	dispute:					
Client's relationship with childr	en:					
Spouse's relationship with child	ren:					
How children will react to separ	ration:					
Parties communicating about ch	ildren:	Yes 🗀	No □ Well	☐ Poorfy	<i>/</i> 🗆	
Children's special needs:					·	
			List for Client		List for Spous	ē
Prior marriages:						
How terminated:						
When terminated:						
Where terminated:			•			
Attach copy of judgment:						
Any children: (ages and address	ses)					
Cash or other support receiv	ed from fo	rmer sp	ouse:			
Cash or other support paid to (Please attach copy of Court Ord						
Do you have a will?	Yes 🗀	No □				
Does your spouse have a will?	Yes 🗌	No □				
,	- #UM-1-14					
(Date)				(Client's Si	gnature)	. <u> </u>

### CLIENT'S INSTRUCTION SHEET

In order to assist both of us in better understanding your financial matters and expenses and costs of living, it is essential that you take a great deal of time and patience in filling out the attached financial information schedule. Every item must be answered, even if there is none, in which case you insert the word "none".

Please follow these instructions carefully, as it will save a great deal of time, effort and money for you in the long run.

Please fill in the exact financial information or, in cases where the exact amount is unavailable, your best estimate as to the amount in the first column if monthly, in the second column if weekly.
 Fill in only the lines that apply to your financial circumstances and specify in the middle column whether this is yearly or monthly.

PLEASE DO NOT FILL IN ANYTHING NEXT TO WORD "SUBTOTAL" WHEREVER IT APPEARS. THAT IS FOR OUR OFFICE PURPOSES ONLY.

2. Where the bills for each of these are available, please clip them to the form when completed and return to the office. This would include such things as mortgage statements, real estate tax bills, telephone bills, credit card statements, automobile credit card statements, college statements or bills, dues from clubs, insurance statements or bank statements.

If you need any help or feel you do not understand anything, please be sure to contact us before you complete this.

SCH	EDULE OF LIVING EXPENSES OF	(PLEASE PRINT YOUR FULL NAME)	
I.	HOUSEHOLD EXPENSES	V == 32 ( Mari 1991) 1 Vac ( Maria)	
₽ <sup>™</sup> (O. —	ITEM	DESIGNATE WHETHER YEARLY OR MONTHLY EXPENSE	WEEKLY
1. a)	Mortgage, principal and Interest	\$	
я	or Principal, Int. & Taxes	\$	
b)	Real Estate Taxes & Assessments (if paid separately)	\$	
c)	Water & Sewer	\$	
d)	Homeowner's Insurance	\$	
e)	Other, i.e., pool loan, 2nd mortgage, home improvement loan (Please specify)	\$	
2. a)	Apartment Reпt	\$	
j)	Condo fees/Maintenance Fees	\$	
c)	Tenants Insurance	\$	
d)	Room & Board if Living with Relatives or Friends	s	
e)	Other (specify)	\$	
	owance for Major Home Repairs maintenance (interior & exterior)		
a)	Yardwork	\$	
b)	Supplies	\$	
c)	Equipment	\$	
d)	Snow Removal	\$	
<b>e</b> )	Rubbish Removal	s	
Ĩ)	Cesspool/Septic tank	3	
. g)	Storm Windows	s	
h)	Plumbing	\$	

\$

Other, (specify) i.e., roof shingles, porch repairs, pool maintenance

NO.	ITEM	DESIGNATE WHETHER YEARLY ( MONTHLY EXPENSE	OR WEEKLY
	lowance for repair and replacement household furniture and appliances		·
a)	Cost of appliance service insurance or maintenance	\$	
b)	Replacement of appliances cost, specify	\$	
c)	Furniture Purchase	\$	
5. Fu	el, Oil Cost		
a)	Cost of service insurance or burner cleaning repairs	\$	
b)	Fuel, Oii	\$	
6.	Major House Cleaning including professional rug & drape cleaning, etc.	\$	
7.	Telephone	\$	
8.	Electric. (Specify if used for heating)	\$	ļ
^	House Gas. (Specify if used for heating)	\$	
10.	Cable TV	\$	
11.	Miscellaneous. Additional expenses for househouseled (include tools, linens, light bulbs, pesticides, etc.)		
	SUI	B TOTAL:	
II. PE	RSONAL EXPENSES		
1. a)	Household food, including soaps, household cleaners and paper products	\$	
þ)	School Lunches	\$	
c)	Meals Eaten at Work	\$	
2.	Dry cleaning and laundry	\$	

NO.	ITEM	DESIGNATE WHETHER YEARLY OF MONTHLY EXPENSE	R WEEKLY
3. Do	mestic Help		
a)	Handyman	\$	ł
b)	Cleaning Man	\$	
c)	Babysitter	\$	
³d)	Other	\$	
4. Clo	othing	•	
a)	Self	\$	
b)	Children	\$	<u> </u>
	S	UB TOTAL:	
——— Ш. <u>М</u>	IEDICAL EXPENSES		
V	(Specify if for self only or includes other family members)		
1. Me	dical		
a)	Internist, general medicine	\$	; 
b)	Psychiatrist	\$	
(c)	Gynecologis:	\$	:
d)	Medical insurance ( <u>if not</u> taken as Payroll deduction)	\$	
<b>e</b> )	Other, specify i.e., psychologist, etc.	\$	
2. a)	Dental (general)	\$	
b)	Orthodontist	\$	
c)	Other (specify) i.e., periodontist	\$	
3. Eye	Doctor		
a)	Purchase of Glasses	\$	
b)	Ophthalmologist (examinations)	\$	
(, a)	Prescriptions	\$	
b)	Cosmetics, aspirin, etc.	\$	

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NO.	ITEM	DESIGNATE WHETHER YEARLY MONTHLY EXPENSE	OR WEEKLY
IV.	AUTO EXPENSES		
gen j	(Specify: Make, Year and Model of each whose possession)	car and in	
a)	Auto Loan payment	\$	
•p)	Gasoline & Oil	\$	
c)	Auto insurance	\$	
d)	Excise Tax	\$	
<b>e</b> )	Repairs Allowance, i.e., tune ups, etc.	\$ <u></u>	
f)	AAA of ALA dues	\$	
g)	Registration, inspection & license costs	\$	
h)	Other expenses, i.e tires, battery, etc.	\$	
	AUTO EXPENSES		
a)	Auto Loan payment	\$	
b)	Gasoline & Oii	\$	
· c)	Auto insurance	\$	
ď)	Excise Tax	\$	
e)	Repairs Allowance, i.e., tune ups, etc.	\$	i :
f)	AAA or ALA dues	\$	
g)	Registration, inspection & license costs	\$	
h)	Other expenses, i.e tires, battery, etc.	\$	
		SUB TOTAL:	
 V.	MISCELLANEOUS		
	itributions	\$	
a)	Church	\$	
b)	Charity	\$	:
c)	Misceilaneous, (Specify)	2	· •
			1

NO.	ITEM	DESIGNATE WHETHER YEARLY OF MONTHLY EXPENSE	WEEKLY
2. Gif	ts to family		
(€ a)	Birthdays	\$	
b)	Weddings	\$	
c)	Anniversaries	\$	
* d)	Christmas	\$	
e)	Miscellaneous	\$	
3.	Life Insurance Premiums  a) Name of Insurance Co.		
	Policy No.	Type: Whole - Term (specify)	
	Cash Surrender Value S	· Payment	
	b) Name of Insurance Co.	moJyr. (specify)	!
`	Policy No.	Type: Whole - Term (specify)	
		; Payment	
	c) Name of Insurance Co.	mo./yr. (specify)	
		Type: Whole - Term (specify)	
	Policy No	· Payment	!
		mo/yr. (speci(y)	
4. a)	Husband - Haircuts Wife - Hairdresser	\$ \$	
1.5	Children	\$	
b)	Self (additional miscellaneous) toiletries, grooming, etc.	\$	
5. High	her Education (If more than one child use specify child and name of school.)	d, use another sheet of paper and attach.	
a)	Tuition	\$	
b)	Board & Room	\$	
c)	Transportation	\$	
d)	Books & Records	\$	
e)	Activitey fees	\$	- 9
·f)	Lab fees	\$	
g)	Insurance	\$	
h)	Supplies	\$	
· i)	Food	\$	
j)	Miscellaneous	s	

NO. ITEM	DESIGNATE WHETHER YEARLY OR MONTHLY EXPENSE	WEEKLY
6. Entertainment, i.e movies, restaurants, trips, camping, etc.		
:) Children	\$	
b) Self	\$	
7. Šports activities equipment, etc. (Please specify)	s	
8. Vacations (Be as specific as possible	le)	
a) Weekends	\$	
b) Winter	\$	
c) Summer	\$	
d) Other	\$	
9. Club Dues		
a) Country Club	\$	
b) Swim Club	\$	
c) Health Club	\$	
Other, i.e., - fraternal organizations, etc. (Please specify)	\$	
0. Children's Allowances		
a) Child age	\$	
b) Child age	\$	
c) Child age	\$	
d) Childage	\$	
1. Allowance for Regular Savings Prog (specify if IRA or Tax Savings)	gram \$	
2 Newspaper, magazines	\$	

NO.	ITEM	DESIGNATE WHETHER YEARLY MONTHLY EXPENSE	or Weekly
	ssional dues, books and odicals & equipment	S	
. Misc	ellaneous Insurance		
a) A	Accidental death	\$	
² b) F	light	\$	
c) I	ncome or disability insurance	\$	
d) <b>N</b>	Mortgage Insurance	\$	
15. Misc	ellaneous	,	
a) C	Cobbler, tailor	\$	
	Thecking Account ervice charge	\$	
do	ousehold pets, i.e., ogs, cats, etc. Please specify)	\$	
d) L	ottery tickets	\$	
16. Child (attach issued	Support a copy of the order, if by a different court)	\$	
	nyment Related Expenses n are not reimbursed)		
a) U:	niforms	\$	
b) Tr	avel	\$	
c) Re	equired Continuing Education	\$	
d) Oi	her (specify)	\$	1
for Vis i.e., pu	rdinary Travel Expenses itation with Child(ren) blic transportation or drives state mileage one way	\$	
19. DayCa	re Expenses	\$	
	y other expenses you have which ve not listed above	\$	
		\$ \$	
		\$	
		SUB TOTAL:	:

NO.	ITEM	DESI	GNATE WHETHER YEARLY O MONTHLY EXPENSE	R WEEKLY
VI.	MISCELLANEOUS BILL PAYMENT		Please Specify Nature of charges for each	
Installment Payments, i.e., credit cards, store charges, etc.			card or payment i.e., clothes, family business, etc.	
à	(Name of Creditor:)	Monthly Payments		
a)		\$		
b)		\$	f	
c)		\$		
d)	·	\$		ļ
e)		\$	Ì	
f)		\$		<u> </u>
g)		\$		
μ́)		\$		
i)		\$		
j)		\$		
k)		\$		
1)		\$		1
m)		\$ \$		
(n) (o)		\$		
p)		\$		
		EXPENDITURES	  \$	
				(For Office Use Only)
				! 
	•			1
				!