

Date: _____

Attorney: _____

Referred by: _____

CLIENT INFORMATION SHEET

A. YOUR INFORMATION

NAME: _____

ADDRESS: _____

EMAIL ADDRESS: _____

MAILING ADDRESS IF DIFFERENT FROM HOME ADDRESS: _____

HOME PHONE: _____

CELL # _____

HOME FAX# _____

OCCUPATION/JOB DUTIES: _____

EMPLOYER: _____

ADDRESS: _____

WORK PHONE: _____

WORK FAX: _____

AGE: _____

DATE OF BIRTH: _____

COUNTRY, STATE AND COUNTY OF BIRTH: _____

SOCIAL SECURITY #: _____

B. INFORMATION FOR SPOUSE/ OTHER PARENT

NAME: _____

ADDRESS: _____

MAILING ADDRESS IF DIFFERENT FROM HOME ADDRESS: _____

HOME PHONE: _____

CELL # _____

HOME FAX# _____

OCCUPATION/JOB DUTIES: _____

EMPLOYER: _____

ADDRESS: _____

WORK PHONE: _____

WORK FAX: _____

AGE: _____

DATE OF BIRTH: _____

COUNTRY, STATE AND COUNTY OF BIRTH: _____

SOCIAL SECURITY #: _____

C. CHILDREN INFORMATION

1) Name: _____

Age: _____

Date of Birth: _____

School: _____

Grade: _____

Social Security #: _____

Any Special learning or health issues: _____

Tuition costs, if any: _____

Child care provider and cost: _____

2) Name: _____

Age: _____

Date of Birth: _____

School: _____

Grade: _____

Social Security #: _____

Any Special learning or health issues: _____

Tuition costs, if any: _____

Child care provider and cost: _____

3) Name: _____

Age: _____

Date of Birth: _____

School: _____

Grade: _____

Social Security #: _____

Any Special learning or health issues: _____

Tuition costs, if any: _____

Child care provider and cost: _____

4) Name: _____

Age: _____

Date of Birth: _____

School: _____

Grade: _____

Social Security #: _____

Any Special learning or health issues: _____

Tuition costs, if any: _____

Child care provider and cost: _____

D. HEALTH/MEDICAL INSURANCE COVERAGE

NAME: _____

ADDRESS: _____

PLAN#: _____

WHO MAINTAINS PLAN: _____

NAME OF BENEFICIARIES: _____

IF MARRIED PLEASE PROVIDE THE FOLLOWING:

E. MARRIAGE INFORMATION

DATE OF MARRIAGE: _____

_____ CIVIL CEREMONY _____ RELIGIOUS CEREMONY

COUNTRY, STATE AND COUNTY OF MARRIAGE: _____

NUMBER OF MARRIAGE: _____

IF PRIOR MARRIAGE, LIST MANNER OF TERMINATION: _____

F. ASSETS ACQUIRED DURING MARRIAGE

1) Real property

(a) Address: _____

Description (1 Family etc) _____

Date acquired: _____

Title: _____

Purchase Price: _____

Down Payment Amount: _____

Approximate value at this time: _____

Approximate 1st mortgage balance at this time: _____

Approximate 2nd mortgage/home equity loan balance at this
time: _____

Monthly mortgage expenses: _____

(b) Address: _____

Description (1 Family etc) _____

Date acquired: _____

Title: _____

Purchase Price: _____

Down Payment Amount: _____

Approximate value at this time: _____

Approximate 1st mortgage balance at this time: _____

Approximate 2nd mortgage/home equity loan balance at this
time: _____

Monthly mortgage expenses: _____

(c) Address: _____

Description (1 Family etc) _____

Date acquired: _____

Title: _____

Purchase Price: _____

Down Payment Amount: _____

Approximate value at this time: _____

Approximate 1st mortgage balance at this time: _____

Approximate 2nd mortgage/home equity loan balance at this
time: _____

Monthly mortgage expenses: _____

2) Accounts (Bank, investments etc)

(a) Type of Account: _____

Bank name and location: _____

Title: _____

Account: _____

Balance: _____

(b) Type of Account: _____

Bank name and location: _____

Title: _____

Account: _____

Balance: _____

(c) Type of Account: _____

Bank name and location: _____

Title: _____

Account: _____

Balance: _____

3) Retirement Benefits (401K, IRA'S, Pensions, Deferred Comp, etc)

(a) Type of Account: _____

Bank name and location: _____

Title: _____

Account: _____

Balance: _____

(b) Type of Account: _____

Bank name and location: _____

Title: _____

Account: _____

Balance: _____

Type of Account: _____

Bank name and location: _____

Title: _____

Account: _____

Balance: _____

4) Specify Degrees, Licenses or Certifications obtained by either party during the Marriage:

G. SEPARATE PROPERTY

List any asset acquired by gift or inheritance during marriage, or brought into the marriage by you, or your spouse:

H. INTAKE NOTES:
