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**FINANCIAL QUESTIONNAIRE**

Name: \_\_\_\_\_ Date completed: \_\_\_\_\_

**PART I. Introduction**

Please complete the following questionnaire setting forth as much detail as possible. This information is necessary for us in our representation of you in separation and/or divorce proceedings. Use additional sheets of paper where more space is needed. Also, provide your attorney documents you have supporting the information you provide on this form.

**ANNUAL INCOME**

**Husband**

Current Gross Annual Income from All Sources:

<u>Name of Source of Income</u>	<u>Amount</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Previous Year's Gross Income from All Sources \$ \_\_\_\_\_

**Wife**

<u>Name of Source of Income</u>	<u>Amount</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Previous Year's Gross Income from All Sources \$ \_\_\_\_\_

**ASSETS EXISTING AT DATE OF SEPARATION AND/OR CURRENTLY**

<i>Description</i>	<i>Title or Owner</i>	<i>Estimated Value on Date of Separation</i>	<i>Present Fair Market Value</i>
<b>Checking Accounts</b> (include name of bank and last 4 digits of the account no.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Savings Accounts</b> (include name of bank and last 4 digits of the account no.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Money Market</b> (include name of bank and last 4 digits of the account no.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Certificates of Deposit</b> (include name of bank and last 4 digits of the account no., interest rate (%) & maturity dates)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Notes Receivable</b> (give interest rate (%) & maturity dates)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

<i>Description</i>	<i>Title or Owner</i>	<i>Estimated Value on Date of Separation</i>	<i>Present Fair Market Value</i>
<b>Stocks</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Stock Options</b> (Please attach copy of current grant/vest schedule)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Bonds</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Mutual Fund Accounts</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Other Assets</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Life insurance <u>with</u> Cash surrender value</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Life insurance <u>without</u> Cash surrender value</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
<b>Annuity investment policy</b>			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____



**Husband and/or Wife's Ownership Interest in any business or profession**

Name and address of the company: \_\_\_\_\_

Type of Company ( i.e. corporation, partnership, etc.) \_\_\_\_\_

Net worth of the business: \_\_\_\_\_

Percent of interest held by you or spouse: \_\_\_\_\_

When said percentage was first acquired: \_\_\_\_\_

Name and address of the company: \_\_\_\_\_

Type of Company ( i.e. corporation, partnership, etc.) \_\_\_\_\_

Net worth of the business: \_\_\_\_\_

Percent of interest held by you or spouse: \_\_\_\_\_

When said percentage was first acquired: \_\_\_\_\_

<i>Description</i>	<i>Title Or Owner</i>	<i>Estimated Value on Date of Separation</i>	<i>Present Fair Market Value</i>
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**Property Held for children** (bonds, educational accounts, etc.)

_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

**Real Estate:**  
**- Marital Residence**

_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

**- Rental** (income producing)

_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

**- Vacation**

_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

**- Other** (Specify)

_____	_____	\$ _____	\$ _____
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<i>Description</i>	<i>Title Owner</i>	<i>Source of Funds to Acquire</i>	<i>Estimated Value on Date of Separation</i>	<i>Estimated Present Fair Market Value</i>
<b>Automobiles</b>				
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
<b>Trucks</b> (set for make, model & year)				
_____	_____	_____	\$ _____	\$ _____
<b>Boats</b> (set forth make, model & year)				
_____	_____	_____	\$ _____	\$ _____
<b>Other assets</b> (please itemize: including but not necessarily limited to tax shelter investments, hobbies, judgments, causes of action, patents, trademarks, copyrights, and any other assets not hereinabove itemized.)				
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____

**LIABILITIES**

Description	Name(s) on Account	Balance on Date of Separation	Current Balance	Required Monthly Payment
<b>Mortgage on residence/dwelling</b>				
(Property Description)				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
<b>Mortgage on other real estate</b>				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
<b>Automobile loan</b>				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
<b>Other notes or loans</b>				
(Specify & name payee; set forth interest rate in % & maturity dates)				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

<i>Description</i>	<i>Name(s) on Account</i>	<i>Balance on Date of Separation</i>	<i>Current Balance</i>	<i>Required Monthly Payment</i>
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**Unsecured obligations**

(Including unpaid medical bills, etc.; specify & give name of creditor)

_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

**Charge Card and Credit Card Accounts**

(Name of card & Acct. No.)

_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

**Other Liabilities**

_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____