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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:

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

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

Wife

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

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>
Checking Accounts (include name of bank and last 4 digits of the account no.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Savings Accounts (include name of bank and last 4 digits of the account no.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Money Market (include name of bank and last 4 digits of the account no.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Certificates of Deposit (include name of bank and last 4 digits of the account no., interest rate (%) & maturity dates)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Notes Receivable (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>
Stocks			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Stock Options (Please attach copy of current grant/vest schedule)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Bonds			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Mutual Fund Accounts			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Other Assets			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Life insurance <u>with</u> Cash surrender value			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Life insurance <u>without</u> Cash surrender value			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Annuity investment policy			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

<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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Accounts Receivable
(Specify from whom)

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

IRAs, KEOGHS, SEPS, 401(K)s or other cash retirement accounts

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

Pension, Retirement, Profit Sharing, Deferred Compensation Plans of Husband and Wife

Provide name of employer, person covered, expected benefits and specific details as supplied by employer regarding pay options, survivor benefits, etc. Please attach a copy of any plan description.

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>
Property Held for children (bonds, educational accounts, etc.)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
Real Estate:			
- Marital Residence			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
- Rental (income producing)			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
- Vacation			
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
- Other (Specify)			
_____	_____	\$ _____	\$ _____

<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>
Automobiles				
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
Trucks (set for make, model & year)				
_____	_____	_____	\$ _____	\$ _____
Boats (set forth make, model & year)				
_____	_____	_____	\$ _____	\$ _____
Other assets (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
Mortgage on residence/dwelling (Property Description)				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
Mortgage on other real estate				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
Automobile loan				
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
Other notes or loans (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

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