

PRE/POST NUPTIAL INTAKE SHEET

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Instructions

Please complete the following intake sheet & return to Ashley M. Myers, P.A. prior to your scheduled appointment. Please be advised that until an appointment has been scheduled **and** a retainer agreement executed, Ashley M. Myers, Esq. does not represent your interest as a client, although all matters disclosed in the initial consultation will be considered privileged and confidential as Ashley Myers will assume you are consulting with her for the purpose of establishing an attorney-client relationship.

General Information Concerning Pre and Post Marital Agreements

Legal Counsel

When agreeing to the terms of a postnuptial agreement or a prenuptial agreement, it is important to know the rights and obligations that you would have under the law simply by the virtue of being married may be significantly different than the rights you will have if you elect to enter into a pre or a post nuptial agreement. Ashley M. Myers, will only represent one party to a pre or a postnuptial agreement and will advise only that particular party of his or her rights and obligations as a result of the marriage. The other party should seek his or her own legal counsel and obtain advice prior to signing a postnuptial agreement.

Disclosure of Financial Circumstances

It is important that prior to agreeing to a either a pre or a postnuptial agreement, you have a general and proximate knowledge of the other party's financial circumstances.

You may waive the right to financial disclosure, however, if I represent you, I will encourage you to provide or to obtain all of the financial information you can, prior to agreeing to the terms of any pre or post-nuptial agreement. You may be aware that you have the more significant resources or you may think the other party has more resources than they do. You may not be aware of the substantial debt the other party has incurred before or during the marriage that may impact

future financial decisions and options. Even if you think you know the financial circumstances of the other party, I do NOT recommend waiving full and fair financial disclosure because it makes it much more difficult for me to advise you if I do not have adequate information.

I will provide my client with a financial affidavit to complete. I will also provide my client with a list of the items generally referred to as “Mandatory Disclosure” in divorce cases, to use as a guide for the type of information that the parties should exchange prior to entering into any form of marital or pre-marital agreement.

Date of scheduled consult:	
Date you are completing this form:	
Potential Client is Wife/Bride or Husband/Groom:	

PERSONAL INFORMATION

Wife’s name:	
Maiden name:	
Wife’s address:	
Home phone:	
Work/alternative:	
Cell:	
Email:	

Husband’s name:	
Husband’s address:	
Home phone:	

Work/alternative:	
Cell:	
Email:	

Wife's Social Security Number:	
Wife's DOB:	
Husband's Social Security Number:	
Husband's DOB:	

REFERRED BY

Referral Source	
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BACKGROUND

Date of Marriage: OR Anticipated Date of Marriage:	
County of Marriage:	
Where do you live?	
Is this one of the parties' home?	
Was the home purchased jointly?	
Does either side own real estate either in his or her sole name, or jointly with anyone else?	

Who?	
Address?	
Attach a separate sheet if necessary.	

EMPLOYMENT INFORMATION

Is anyone disabled? If so, who?	
What is the basis for the disability?	

Wife's Occupation:	
Wife's Employer, Name and Address:	
How long has Wife been employed with this employer?	
Wife's approximate income?	

Husband's Occupation:	
Husband's Employer, Name and Address:	
How long has Husband been employed with this employer?	
Husband's approximate income?	

PARTIES' HEALTH:

Is the Husband in good health? If not, list physical and / or psychological issues:	
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Is the Wife in good health? If not, list physical and or psychological issues:	
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CHILDREN

This form provides for 5 children, if more are involved, please add additional children's information.

How many children were born as a result of the parties' relationship?	
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<p>Does either party have children as a result of another relationship?</p> <p>Provide names and dates of birth and father's name for each child, even if that child is now an adult.</p> <p>Children continued:</p>	<p>Name: DOB: Father's name: Mother's name:</p> <p>Name: DOB: Father's name:</p> <p>Name: DOB: Mother's name: Father's name:</p> <p>Name: DOB: Mother's name: Father's name:</p> <p>Name: DOB: Mother's name: Father's name:</p> <p>Name: DOB: Mother's name: Father's name:</p> <p>Name: DOB: Mother's name: Father's name:</p> <p>Name: DOB: Mother's name: Father's name:</p>
<p>Is anyone paying child support or receiving child support?</p>	<p>Name of any party receiving child support:</p> <p>Name of any parent paying child support:</p>

	<p>How much:</p> <p>By Court Order?</p> <p>If yes, please provide a copy of the order.</p> <p>For Which Child?</p>
Who, if anyone, is or will, be providing insurance for either of the parties getting married or any child of either party or the parties'?	
What kind? Health, Dental, Life?	
<p>Do any of the minor children have any behavioral issues?</p> <p>If so, which child and what type of issues:</p>	
<p>Is a child of either party or the party engaged seeing a psychologist?</p> <p>If so, which child and who do they see for therapy/treatment/counselling?</p>	

ABUSE ISSUES

Has either the Wife or the Husband either been alleged to have committed any act of domestic violence or accused anyone of committing an act of domestic violence in this relationship or in any past relationship?

If you do not know the answers to these questions, NOW, rather than later, is the time to find out. If someone claims that they had an injunction for protection against domestic violence entered against him or her that was

“bogus,” we need to review the petition and the order. Find out who the alleged “bogus” victim was and what county any charges or petitions for protection were filed. If you are too nervous to ask, we can hire a private investigator to find out.

If so, who made the allegation of abuse? Or was the victim of abuse?	
Who was the aggressor? Who was the victim?	
Describe the alleged abuse:	

FINANCIAL INFORMATION

Assets:

1. Real estate:	
2. Stocks:	
3. Bonds:	
4. Pension, 401K:	
5. Bank accounts, joint and separate:	
6. Vehicles:	

Wife drives:	
Husband drives:	

7. Boats:	
8. Businesses:	Husband: Wife:
9. Household furnishings:	Husband: Wife:

10. Cash surrender value life insurance:	Husband: Wife:

Liabilities generally:

1. Credit cards:	Husband total credit card debt: Wife total credit card debt:
2. Mortgages:	Husband: Wife:
3. Car loans:	Husband: Wife:
4. Student loans:	Husband: Wife:
5. Judgments:	Husband: Wife:

6. Promissory notes:	Husband: Wife:
7. Leases:	Husband: Wife:
8. Debts to insiders/relatives:	Husband: Wife:

ALIMONY

Does either side want alimony if the marriage ends in divorce?	
Have terms been discussed?	
Wife's highest education level?	
Husband's highest education level?	
Did both parties work outside the home prior to the marriage? DO both parties intend or have they worked outside the home during the marriage?	
Is there an agreement that either side will quit his or her job if children are born to the parties during the marriage or for any other reason?	

<p>Has anyone already made sacrifices prior to getting married to support the other party's career, education, other party's children, etc.?</p> <p>Has anyone moved for the other party's job?</p> <p>Stayed home to take care of children to prioritize the other party's career?</p> <p>Been promised anything that has not come to fruition?</p>	
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THINGS TO CONSIDER PRIOR TO OUR MEETING AND IF POSSIBLE, TO WRITE DOWN AND BRING WITH YOU

IN THE EVENT THE MARRIAGE ENDS IN DIVORCE, WHAT ARE YOUR GOALS OR OBJECTIVES?

IN THE EVENT THE MARRIAGE ENDS IN DEATH, WHAT ARE YOUR GOALS OR OBJECTIVES?

HAVE YOU, OR TO YOUR KNOWLEDGE YOUR FIANCE OR SPOUSE: CONSULTED WITH AN ESTATE PLANNING ATTORNEY?

CONSULTED A CPA OR TAX ADVISER OF ANY KIND?

CONSULTED A CERTIFIED FINANCIAL PLANNER?

IF SO, WHO?