

**PRENUPTIAL AGREEMENT
INFORMATION SHEET**

Your Name: _____
Date of Birth: _____ Social Security Number: _____
Driver's License No. _____
Home Address: _____
Phone Numbers: Home: _____ Business: _____
Cell Phone: _____ Fax No. _____
E-mail address: _____
Employer's name: _____
Address: _____
Income: _____

Fiancée's Name: _____
Date of Birth: _____ Social Security Number: _____
Driver's License No. _____
Home Address: _____
Phone Numbers: Home: _____ Business: _____
Cell Phone: _____ Fax No. _____
E-mail address: _____
Employer's name: _____
Address: _____
Income: _____
Fiancée's Lawyer's Name: _____
Address: _____
Telephone Number: _____

If you and your fiancée are living together, how long have you been living together? _____

Where do you prefer to receive correspondence from our office? _____

Is that address confidential? _____

At what number do you prefer to be contacted? _____

Is that number confidential? _____ Is voice mail ok? _____

Date of Wedding: _____ Place of Wedding: _____

List all of the preparations that have been made for the wedding:

If you were presented with a proposed Prenuptial Agreement, when were you given the document? _____

When were you first told that your Fiancée wanted to enter into a Prenuptial Agreement? _____

Military history, if any:

Yours: _____

Your Fiancée: _____

If you are divorced:

Name of Former Spouse(s): _____

Date(s) of Divorce: _____

Place(s) of Divorce: _____

If your fiancée is divorced:

Name of Former Spouse(s): _____

Date(s) of Divorce: _____

Place(s) of Divorce: _____

If either of you have any children:

Name of Child:	Date of Birth	Address	Custodial Parent	Child Support Received/Paid

If either of you is receiving or paying alimony, or equitable distribution, please indicate the recipient and the amount received. Also indicate the terms of the agreement requiring the payments. _____

PREMARITAL ASSETS

A. BANKING:

1. Checking Accounts: For each account indicate the source of the funds

Name and address of Bank	Account number	Owner or Owners	Source of Funds

2. Savings Accounts (including IRA accounts): For each account indicate the source of the funds

Name and address of Bank	Account number	Owner or Owners	Source of Funds

3. Certificates of Deposit (including IRA accounts): For each account indicate the source of the funds

Name and address of Bank	Account number	Owner or Owners	Source of Funds

4. Mortgages, Loans, Notes:

Name of Lender:	Amount of Loan	Monthly Payment	Maturity Date

5. Safe Deposit Box(es)

Joint Owner, if any:	Location

B. REAL ESTATE:

Location:	Title held by:	Estimated Value:	Mortgage

C. STOCKS (exclusive of closely held businesses) AND BONDS:

1. Brokerage Accounts:

Name & address of Brokerage Firm	Owner	Account No.	Telephone No.	Amount in Account:

2. Stocks (Not Included in Brokerage Accounts)

Name Stock:	of	Owner	Number of Shares:	Date Purchased	Purchase Price	Today's Value

3. Bonds (Not Included in Brokerage Accounts)

Name Bonds:	of	Owner	Number of Shares:	Date Purchased	Purchase Price	Today's Value

D. INSURANCE (Life and otherwise):

1. Owned by you on your life:

Company	Policy No.	Amount	Beneficiary	Cash Surrender

2. Owned by others on your life:

Company	Policy No.	Amount	Beneficiary	Cash Surrender

3. Owned by you on life of others:

Company	Policy No.	Amount	Beneficiary	Cash Surrender

4. Group Life Insurance (paid for by your company):

Company	Policy No.	Amount	Beneficiary	Cash Surrender

5. Accident & Health Insurance:

Company	Policy No.	Amount	Beneficiary	Cash Surrender

6. Disability Insurance:

Company	Policy No.	Amount	Beneficiary	Cash Surrender

E. MISCELLANEOUS PROPERTY

1. Personal Property (e.g. Autos, boats, jewelry, art collection, stamp collection, professional equipment, patents,, trademarks or copyrights, contract rights)

Description of Item	Location	Estimated Value

2. Notes held by you

Debtor	Payments Received	Date of Note	Amount owed to you

3. Interests in Estates and Trusts

Will or Trust	Interest

4. Interests in Pension, profit sharing, stock bonus or other retirement plan(s)

Name and Address of Plan	Description	Beneficiary

F. BUSINESS INTERESTS

Legal name of entity	% of ownership interest	Assets owned by entity	Estimated value of business	Estimated value of your interest

PREMARITAL LIABILITIES

Debts, including mortgages, credit card obligations, loans against life insurance, obligations under divorce agreements:

Total Amount of Debt	Monthly Payment	Lender	Responsible Party:

Credit Cards Held:

Credit Card	Account Number	Amount Owed	Responsible Party:

Gifts and Transfers (over \$10,000) During Lifetime

Name of Recipient	Amount of Gift	Date of Gift

Proposed treatment of assets/income during marriage and proposed disposition of assets/debts in the event of divorce: _____

SEPARATE PROPERTY: (property owned by either party prior to the signing of the Agreement; property acquired by gift, devise, or inheritance; any property acquired by one party, during the marriage, in his or her name alone; all interest, rent, dividends, profits or other income acquired from separate property; and any appreciation in value of the separate property) shall be treated as follows: _____

JOINT PROPERTY: (property acquired during the marriage in both names) shall be treated as follows: _____

JOINT PROPERTY: (property acquired in both names where separate property of each or either party used in the acquisition) shall be treated as follows: _____

EARNINGS: (income derived from employment, interest, dividends etc.) shall be treated as follows: _____

MARITAL EXPENSES: The living expenses during our marriage are to be paid as follows: _____

HEALTH CARE AND INSURANCE: Health care and insurance to be paid as follows:

CHILDREN:

Do you plan on having children? _____ If so, please indicate the following:

1. Preference of religious upbringing: _____

2. Decisions regarding education or medical care shall be made as follows:

3. Children from prior marriage are living with: _____

4. Expenses for children from prior marriage shall be paid as follows: _____

DEBTS:

1. We will treat separate debts as follows: _____

2. We will treat joint debts as follows: _____

SPECIAL CIRCUMSTANCES:

ADDITIONAL INFORMATION

MARITAL PROPERTY:

1. How will you handle the income and assets you accumulate together? _____

2. Will they be owned 50/50? _____

3. Will you use another arrangement? _____

MANAGEMENT OF ASSETS AND INCOME:

4. Who will make the financial decisions and handle the checkbook? Will you do it together, or will one person be the primary financial manager? Will this be separate

bank accounts, with one joint household account for bill paying? If so, how will it be funded and how frequently? How will the amount be determined? _____

5. What about large expenditures? Does your spouse need to ask you before buying that plasma TV or designer gown? _____

6. How will the household bills get paid and whose responsibility is it to pay them?

7. Will you have joint bank accounts, separate bank accounts, or both? _____

8. Do you have similar money styles/habits with respect to debt and/or savings? _____

9. Have you discussed your financial goals and how each of you will contribute? What about retirement savings? _____

10. Will the decision-making authority be different for pre-marital property or debt that belonged to one of you before the marriage? _____

11. If one of you owe spousal support or child support from a previous marriage, how will those payments be made? From joint property or income or separate property? _____

12. In the event of separation or divorce, would the other spouse want or expect a reimbursement for these payments made during the marriage? _____

13. What if the obligation is informal like voluntarily paying for an adult child's college? _____

CREDIT AND DEBIT:

14. Do either of you have bad credit? Will you or your spouse jointly sign on new credit obligations? _____

WORKING:

15. What is your expectation about the kinds of jobs and income you will each have?

16. Do either of you anticipate a career change at any point in time? How will this new job affect your relationship? Is it a risky job, i.e. firefighter, military personnel, or stunt performer? _____

17. Other jobs do not pay very well but are personally rewarding. Teachers and non-profit positions typically don't pay very well. How would you feel if your spouse changed careers? _____

18. When do you plan to retire? As early as possible? Do you plan to work as long as you are able? _____

19. Do you anticipate both of you continuing to work after having children? Would one of you stay home? For how long? _____

20. How will you handle move-away decisions? What if one of you was transferred for your work and had to move to another state? _____

21. What if one of you wanted to move closer to extended family after having children? _____

22. How do you feel about spousal support (alimony)? Discuss limitations on the amount, terms and duration of support? _____

23. Do you want to make terms about spousal support or alimony that are different than what state law allows? _____

24. Do you both expect to work and to contribute to the household? What are those expectations? _____

25. Would there be a circumstance that would lead to one partner not working such as a health problem or birth of a child? What about going back to school? Does that change your mind about how you feel about spousal support or alimony? _____

GIFTS FROM FAMILIES:

26. Would the gift from the family be marital or community property or the property of the spouse whose family gave the gift/money? _____

27. If it is a loan, who would be responsible for repaying it? How? When? _____

TAXES:

28. Will you file separate taxes or joint taxes? _____

29. Does either partner have questionable tax deduction or a lighthearted attitude toward filing taxes at all? Does that worry the other partner? _____

30. Is there old tax debt? Are back taxes owed? If so, how will they be paid? Jointly, individually, and from which checkbook/account? Who will be responsible for that debt, knowing that a refund while you are married could be seized to pay an old premarital debt? _____

HIGHER EDUCATION:

31. Will one of you be attending college, graduate school, or professional school during the marriage? _____

32. Will one of you have to support the other while he or she is in school? _____

33. How will you deal with this sacrifice made by one person if the marriage does not work out? _____

34. How will student loans be repaid? _____

35. Would the expectations about income and earnings change if one person wants to go back to school after you have been married for several years? _____

DURATION OF THE AGREEMENT:

36. Does having children change your opinion on how your Agreement should work? What about being married 10, 20, 30 or 50 years? Would the Agreement ever expire or be re-negotiated? _____

37. If you separate, does it matter who chooses to end the marriage? Does it matter why? _____

38. Would you like for the Agreement to be re-negotiated at a specific time, like 5 years after the marriage, or after the birth of the first child? _____

BUSINESS OWNERSHIP:

39. If you and/or your spouse own a business separately, would your Prenuptial Agreement include an indemnification on the business debts and taxes? Business taxes? Personal taxes? Back taxes? Payroll taxes? _____

40. Discuss the type of business entity (sub-chapter S, corporation or LLC etc.) and how the corporate spouse determines his or her own income? _____

41. Do you want to make provisions for forensic accountant or auditing books in the event of a separation or divorce? _____

42. Do you want an agreement on how much income will be contributed to the household and how much might be kept separate? _____

43. What if a premarital business starts a new business or subsidiary after the marriage? _____

DEATH OR DISABILITY:

44. Does it make a difference if you are separated or living separately when one of you dies (even though you have not filed for a divorce) or if one of you dies while you are happily married? _____

45. Who will you name as beneficiary on your retirement plans, IRAs, and survivor annuity benefits on pension plans? _____

46. Would your Prenuptial Agreement end on death? _____

47. Will the surviving spouse be able to support the same lifestyle in the event of your death? Discuss life insurance considerations? _____
