



## *Divorce Information Sheet*

**Name:** \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

**Date:** \_\_\_\_\_

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## ***Wife's Information***

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: (\_\_\_\_) \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_

Gross Income: \_\_\_\_\_ Net Income: \_\_\_\_\_

Attorney: \_\_\_\_\_ Phone: \_\_\_\_\_

## ***Husband's Information***

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: (\_\_\_\_) \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Birthdate: \_\_\_\_\_

Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_

Gross Income: \_\_\_\_\_ Net Income: \_\_\_\_\_

Attorney: \_\_\_\_\_ Phone: \_\_\_\_\_

***Wife's Settlement Proposal*** (Attach additional pages if needed)

Proposed Asset Division \_\_\_\_\_

Monthly Maintenance: \_\_\_\_\_ How Long: \_\_\_\_\_

Monthly Child Support: \_\_\_\_\_ How Long: \_\_\_\_\_

Contribution to Children's College Expenses: \_\_\_\_\_

***Husband's Settlement Proposal*** (Attach additional pages if needed)

Proposed Asset Division \_\_\_\_\_

Monthly Maintenance: \_\_\_\_\_ How Long: \_\_\_\_\_

Monthly Child Support: \_\_\_\_\_ How Long: \_\_\_\_\_

Contribution to Children's College Expenses: \_\_\_\_\_

***Children's Information***

| Name | Birthdate | Social Security # | Percentage |
|------|-----------|-------------------|------------|
|      |           |                   |            |
|      |           |                   |            |
|      |           |                   |            |

Will your children attend college? \_\_\_\_\_ YES \_\_\_\_\_ NO

If yes, will the college be Public \_\_\_\_\_ or Private \_\_\_\_\_

Do you currently maintain investments to help pay for the cost of college? \_\_\_\_\_

What percent of your children's education do you plan to pay for? \_\_\_\_\_

***Residence***

Fair Market Value of Home: \_\_\_\_\_ Monthly Payment: \_\_\_\_\_

Remaining Balance of Mortgage: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Years Remaining to Pay: \_\_\_\_\_ Basis in the House: \_\_\_\_\_

Will the House be Sold? \_\_\_\_\_ YES \_\_\_\_\_ NO

If No, Who Wants to Stay in the House: \_\_\_\_\_

## *Other Real Estate*

| Address | Current Value | Monthly Payment | Remaining Balance | Interest Rate |
|---------|---------------|-----------------|-------------------|---------------|
|         |               |                 |                   |               |
|         |               |                 |                   |               |
|         |               |                 |                   |               |

## *Cash Accounts*

| Institution                   | Husband | Wife |
|-------------------------------|---------|------|
| Checking                      |         |      |
| Savings                       |         |      |
| CD's                          |         |      |
| Cash Values of Life Insurance |         |      |

## *Taxable Investment Accounts*

| Description (Institution) | Husband | Wife |
|---------------------------|---------|------|
| Bonds                     |         |      |
| Stocks                    |         |      |
| Mutual Funds              |         |      |
| Annuities                 |         |      |
| Other Investments         |         |      |
| Automobiles               |         |      |
| Personal Property         |         |      |

## *Liabilities*

| Description/Institution | Original Balance/<br>Current Balance | Date of Loan | Rate % & Term (yrs) | Monthly Payment |
|-------------------------|--------------------------------------|--------------|---------------------|-----------------|
|                         |                                      |              |                     |                 |
|                         |                                      |              |                     |                 |
|                         |                                      |              |                     |                 |
|                         |                                      |              |                     |                 |
|                         |                                      |              |                     |                 |

## ***Business Ownership***

| <b>Entity Name</b> | <b>Owner/<br/>Co-Owners</b> | <b>Fair Market<br/>Value</b> | <b>Tax Basis</b> | <b>Ownership %</b> | <b>Type of<br/>Entity</b> |
|--------------------|-----------------------------|------------------------------|------------------|--------------------|---------------------------|
|                    |                             |                              |                  |                    |                           |
|                    |                             |                              |                  |                    |                           |
|                    |                             |                              |                  |                    |                           |

## ***Budget*** (Please attach your budget)

Wife's Expenses (Yearly Total): \_\_\_\_\_

Husband's Expenses (Yearly Total): \_\_\_\_\_

## ***Retirement Goals***

At what age do you want to retire? \_\_\_\_\_

Do you currently receive any social security benefits? \_\_\_\_\_ YES \_\_\_\_\_ NO

If so, what amount are you receiving? \_\_\_\_\_

What is your future social security amount? \_\_\_\_\_

What is the amount of your Disability Insurance? \_\_\_\_\_

What is the amount of your Life Insurance? \_\_\_\_\_ Is it Term or Whole Life: \_\_\_\_\_

What are the premiums you pay per year? \_\_\_\_\_

Do you have a will/trust? \_\_\_\_\_

Are you or your spouse a beneficiary of any Trusts? YES \_\_\_\_\_ NO \_\_\_\_\_

### **Please pick one of the following that you would be comfortable with:**

- Investment G is expected to have a return of 7%, although there is a slight chance that the investment will lost value over the next year.
- Investment H is expected to have a return of 10%, although there is a moderate chance that the investment will lose value over the next year.
- Investment I is expected to have a return of 13%, although there is a substantial chance that the investment will lose value over the next year.

Ten years from now, where would you like to be financially?

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Is there anything else we should know?

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