

**CLIENT INFORMATION**  
**(Must be completed)**

**YOU:**

First, Middle, Last Name: \_\_\_\_\_

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

City, State, ZIP: \_\_\_\_\_

Phone No. (work): \_\_\_\_\_ (Cel): \_\_\_\_\_ (home): \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Former last name(s): \_\_\_\_\_

DO YOU WANT YOUR NAME CHANGED? \_\_\_\_\_ TO WHAT? \_\_\_\_\_

Date of birth: \_\_\_\_\_ Age: \_\_\_\_\_ Current occupation: \_\_\_\_\_

Employer name: \_\_\_\_\_ Employer Address: \_\_\_\_\_

Approximate monthly Income: Gross: \$ \_\_\_\_\_ Take Home: \$ \_\_\_\_\_ \*PROVIDE COPY OF PAY STUB

**SPOUSE/OTHER PARENT:**

First, Middle, Last Name: \_\_\_\_\_

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

City, State, ZIP: \_\_\_\_\_

Phone No. (work): \_\_\_\_\_ (Cel): \_\_\_\_\_ (home): \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Former last name(s): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Age: \_\_\_\_\_ Current occupation: \_\_\_\_\_

Employer name: \_\_\_\_\_ Employer Address: \_\_\_\_\_

Approximate monthly Income: Gross: \$ \_\_\_\_\_ Take Home: \$ \_\_\_\_\_ \* PROVIDE COPY OF PAY STUB

Do either of you have income from any other source? \_\_\_\_\_ List (use back of page, if necessary) :

\_\_\_\_\_

**MINOR CHILDREN OF THIS ACTION**

Full Name	BirthDate	Age	SSN	Full Name	Birth Date	Age	SSN
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\_\_\_\_\_

\_\_\_\_\_

Do you or your spouse/partner have any children not born your relationship? Yes \_\_\_\_\_ No \_\_\_\_\_

If so, give names and ages: \_\_\_\_\_

**ASSETS:** Do you own your own home? \_\_\_\_\_. If so, give approximate value: \_\_\_\_\_. Do you own any other real estate? If so, give approximate value: \_\_\_\_\_

**PROVIDE COPIES OF LEGAL DESCRIPTIONS FOR YOUR HOME AND OTHER LAND/HOMES.**

**Mortgages, Liens, or Other Debts On Real Estate, including lines of credit:**

Creditor's Name	House or other land?	Tax value of property	Current Balance	Monthly Payment

**AUTOMOBILES/MOTOR VEHICLES**

	YOU	SPOUSE	OTHER
Year, make and model			
Name(s) on Title			
Name of Creditor			
Amount owed			
Monthly Payment			
Leased? (Yes/No)			
Approximate value			

Any other vehicles/snowmobiles/boats (indicate if you owe money and to whom, plus values; use additional paper if necessary):

\_\_\_\_\_

**PENSIONS AND RETIREMENT ACCOUNTS:**

List the names (and approximate values) of the life insurance policies, pensions, retirement accounts, 401(k) etc held by you and your spouse. Also state if there are any loans against any accounts (use back of page if necessary):

\_\_\_\_\_

\_\_\_\_\_



## YOUR APPROXIMATE MONTHLY EXPENSES

Item	You	Children
<b>Housing:</b>		
Mortgage or Rent Payment		
Property Taxes and Association Dues		
Homeowner's/Renter's Insurance		
<b>Utilities</b>		
Electricity		
Gas		
Water/Sewer		
Heat (gas or oil)		
Garbage		
Telephone (land line)		
Cell phones		
Internet		
<b>Food</b>		
Groceries		
Restaurants/lunches		
<b>Home Maintenance</b>		
Cleaning Supplies		
Cleaning/snow/lawn services		
Home repair/maintenance (average)		
<b>Apparel/Upkeep</b>		
Clothing and shoes		
Laundry and dry cleaning		
<b>Medical Care</b>		
Medical and dental insurance if NOT taken from paycheck:		
Deductibles and copays (average)		
Medications/prescription copays		

Eye care (average)		
Orthodontia		
<b>Transportation</b>		
Car Payment		
Vehicle Insurance (average monthly)		
Maintenance and Repairs		
Gas		
License Tabs		
<b>Miscellaneous</b>		
Entertainment (golf and sporting events)		
School Lunches for children		
Lessons/Camps for children		
Sport fees for children (average)		
Uniform fees for children (average)		
Field Trips for children		
School Supplies		
Allowances for children		
Health club membership/dues		
Papers, books, magazines (average)		
Haircuts/etc		
Cosmetics/Toiletries		
Contributions to church/charities		
Gifts (average)		
Pet Care (food, vet visits)		
Savings		
Travel - airfare + hotel, meals (average)		
<b>TOTAL:</b>		

## DOCUMENTS, INSTRUMENTS, AND DATA I MAY NEED:

1. Your AND your spouse's paycheck stubs, for the past three months, if possible.
2. Copies of your joint or individual income tax returns, both state and federal, for the past three years.
3. Deeds, abstracts and Torrens certificates showing the legal description of your homestead and any other real estate owned by you or your spouse, individually or jointly.
4. Mortgage or contract for deed balance on homestead and any other real estate. Bring the last monthly mortgage payment statement if you have one.
5. All papers and documents covering the initial purchase of your homestead or any other real estate, including purchase agreement.
6. Tax Assessor's statements on homestead and other real properties.
7. Savings and checking account statements held by you and/or your spouse.
8. List of corporate stocks and/or stock certificates, if possible, owned by you and your spouse, individually or jointly. Also give name of broker or brokers.
9. Current life insurance policies, with statements of loans against same.
10. A copy of any pension or retirement programs, profit sharing, deferred compensation and/or investment programs, you or your spouse may be involved in through your employment, savings accounts, and documents reflecting you and your spouse's Individual Retirement Account(s) (IRA).
11. A copy of any financial statements or statements of net worth prepared by you or your spouse for the purpose of securing bank loans or for any other purpose.
12. Any other information that will help establish your net worth, your spouse's net worth, your joint net worth, your income, and your spouse's income.
13. Any pleadings and legal papers in your possession relating to this action or any prior divorce (dissolution) action for yourself or your spouse.
14. Any U. S. Social Security records or documents reflecting your and/or your spouse's earnings and qualifications for retirement benefits.
15. Copies of any documents showing any inheritances, separate gifts, injury, accident or workman's compensation type claims, and property owned before the marriage for both spouses.