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CONFIDENTIAL PREMARITAL AGREEMENT INTAKE FORM

It is important to complete this questionnaire as fully and accurately as possible. This form is designed to provide important information that will be used to determine what may be important issues to discuss at our first meeting. A complete and accurate form will result in a more productive first meeting.

TODAY'S DATE: _____

Were you referred? Yes _____ No _____ If yes, by whom? _____

EXPECTED DATE OF MARRIAGE: _____

Please answer the following with regard to you and your intended spouse:

BASIC INFORMATION

YOUR NAME: _____

ADDRESS: _____

TELEPHONE NO: _____ E-MAIL: _____

DATE OF BIRTH: _____ PLACE OF BIRTH: _____

SOCIAL SECURITY NUMBER: _____

EMPLOYMENT: _____

EMPLOYMENT ADDRESS: _____

Prior Marriages? Yes _____ No _____ How many? _____

If yes, to whom (next prior if multiple): _____

If yes, when and how terminated: _____

List any children, with names and birth dates:

Name

Birth Dates

FUTURE SPOUSE'S NAME: _____

ADDRESS: _____

TELEPHONE NO: _____

DATE OF BIRTH: _____ PLACE OF BIRTH: _____

EMPLOYMENT: _____

SOCIAL SECURITY NUMBER: _____

Prior Marriages? If yes, to whom: _____

If yes, when and how terminated: _____

List any children, with names and birth dates:

Name

Birth Dates

Do you and your future spouse live together? _____

If yes, please indicate:

Length of time who's home: _____

Circumstances (own, rent, jointly held, etc.) _____

Has your intended spouse made any contributions to you, economically? If so, in what way?

If yes, please set forth details of the circumstances: _____

PURPOSE OF AGREEMENT

A. Segregate present property, gifts and inheritance in the event of death.

Yes _____ No _____

B. Segregate present property, gifts and inheritance in the event of divorce.

Yes _____ No _____

C. Permit all assets during the marriage to be segregated in the event of divorce.

Yes _____ No _____

D. To Provide:

1. Spousal Support Yes _____ No _____

2. Division of Assets Yes _____ No _____

3. Details Concerning Liability Yes _____ No _____

4. Responsibilities During Marriage Yes _____ No _____

ASSETS PRESENTLY HELD AND ANTICIPATED

1. Real Estate. Condominiums. Time Sharing Interests. Vacation Home

<u>Location</u>	<u>Type</u>	<u>Purchase Price</u>	<u>Purchase Price</u>	<u>Value</u>	<u>Mortgage</u>
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2. Checking Accounts

<u>Bank</u>	<u>Account No.</u>	<u>Balance</u>

3. Savings Accounts

<u>Bank</u>	<u>Account No.</u>	<u>Balance</u>

4. Certificates of Deposit. Treasury Bills. Money Market Funds, etc.

<u>Investment</u>	<u>Account No.</u>	<u>Balance</u>

5. Notes/Accounts Receivable

<u>Payee</u>	<u>Account No.</u>	<u>Due</u>

6. Marketable Securities

<u>Holding</u>	<u>No. of Shares</u>	<u>Trade Price</u>
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7. Stock Options

<u>Holding</u>	<u>No. of Shares</u>	<u>When Vested</u>	<u>Price</u>
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8. Business Interests (including S Corporations, LLC, LLP)

<u>Description</u>	<u>Values</u>	<u>Nature of Interest</u>
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9. Insurance (Life, Homeowners, Health)

<u>Company</u>	<u>Type</u>	<u>Policy No.</u>	<u>Amount of Coverage/Value</u>	<u>If any Beneficiary</u>
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10. Automobiles. Boats

<u>Year/Make</u>	<u>Model</u>	<u>Purchase Price</u>	<u>Value</u>	<u>Outstanding Loan</u>
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11. Personal Property (Antiques, Jewelry, Furnishings)

<u>Description</u>	<u>Value</u>	<u>Location</u>
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12. Pension Plan/IRA, etc. – Please give details

13. Trust Information

<u>Name of Trust</u>	<u>Type of Interest</u>	<u>Value</u>	<u>Yearly Income Received</u>
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POTENTIAL INHERITANCES

Please list here any potential inheritances you anticipate receiving in the future, as follows:

<u>Benefactor</u>	<u>Anticipated Inheritance</u>

C. **LIABILITIES**

1. Credit Cards/Charge Cards

<u>Company</u>	<u>Account No.</u>	<u>Present Balance</u>

2. Mortgages

<u>Lender</u>	<u>Current Balance</u>	<u>Int. Rate</u>	<u>Date of Loan</u>

3. Notes

<u>Owed To</u>	<u>Date of Note</u>	<u>Balance</u>	<u>Collateral, If Secured</u>	<u>Due</u>

4. Insurance Policy Loan

Company Date Amount Current Balance Due

5. All Other Debts

Owed To Date Incurred

I UNDERSTAND THAT COMPLETING THIS CLIENT INTAKE FORM DOES NOT CONSTITUTE LEGAL REPRESENTATION UNTIL I HAVE SIGNED A FEE AGREEMENT AND PAID THE REQUIRED RETAINER.

Date

Signature