

DISSOLUTION INTAKE FORM

Date: _____

	You	Spouse
Name (full legal)		
Maiden/Other Names		
Residence Address		
E-Mail Address		
Cell Phone #		
Home Phone #		
Work Phone #		
Date & Place of Birth		
Social Security #		
Driver's License		
Education		

Date of Marriage: _____ Place of Marriage: _____
 Date of Separation: _____ Reason for Separation: _____

<u>Name of Child</u>	<u>M/F</u>	<u>Date of Birth</u>	<u>Place of Birth</u>	<u>School</u>

State the current custodial arrangements and any preferences or agreements regarding custody of the children.

What is important to you in this divorce? (i.e. house, children, restraining orders, separate property) _____

Describe your goals for the future: _____

List any questions you would like to discuss: _____

- Do you or your spouse have problems with any of the following? Physical violence Gambling
 Alcohol Abuse Drug Abuse Financial/Debt Physical Disability Mental Illness
 Boyfriend or Girlfriend

INCOME INFORMATION

	You	Spouse
Current Employer		
Employer Address		
Employer Phone #		
Your Job Title		
Date Job Started		
Work Schedule/Hrs		
Pay Rate		
Gross Income		
Second Job		
Rental Income		
Dividends/Interest		
Trust Income		
Disability Income		
Retirement Income		

BUSINESS INTERESTS

Annual Business Profit		
Business Name		
Business Address		
Type of Business		
Your Title		
Percentage Interest		
Current FMV		
Date Business Acquired		
Cost of Acquisition		
Source of Funds		
Business Accountant		

REAL PROPERTY

	Property 1	Property 2
Address		
Names on Title		
Date of Purchase		
Purchase Price		
Source of Funds		
Fair Market Value		
First Loan Balance		
Monthly Payment		
Second Loan Balance		
Monthly Payment		
Annual Property Taxes		
Dates of Refinances		

ACCOUNTS

(Provide Names of Financial Institution, Account Numbers, and Current Balances/)

Checking Accounts	\$
	\$
	\$
	\$
Savings Accounts	\$
	\$
CDs	\$
Brokerage Accounts	\$
	\$
Stocks / Bonds	\$
	\$
Retirement Accounts	\$
	\$
	\$

VEHICLES

	1	2	3	4
Year, Make, Model				
Name(s) on Title				
Date Acquired				
Fair Market Value				
Amount of Loan				
Who Drives This Car?				

OTHER PERSONAL PROPERTY

	Loan Balance	FMV
Household Furniture	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
Motorcycles	\$	\$
Motor Homes/RVs	\$	\$
Trailers	\$	\$
Watercraft	\$	\$
Airplanes	\$	\$
Precious Metals/Coins	\$	\$
Investment Jewelry	\$	\$
Collections/Hobbies	\$	\$
Other Assets	\$	\$
	\$	\$
	\$	\$

How were you referred to this office?

Personal Referred by friend General Reputation Internet Search Yellow Pages

Other: _____

REMINDERS

1. Obtain the following documents:
 - a. Tax returns (3 years);
 - b. Current pay stubs showing current year-to-date information;
 - c. Business statements;
 - d. All bills and accounts as of the date of separation;
 - e. Retirement statements.
2. Discontinue use of all joint bank accounts except to pay joint bills.
3. Close all joint charge accounts and notify your spouse of this step.
4. Once the Petition for Dissolution is filed, you will not be permitted to make any changes to any insurance policies and you will be restrained from removing personal property and concealing or removing funds from any accounts, except to pay for your normal living expenses.
5. The law requires full and truthful disclosure of all financial circumstances. Information you provide here should be accurate and truthful to the best of your ability.