

INTAKE INFORMATION SHEET

DATE _____

1) CLIENT'S INFORMATION

Name: _____ SS No. _____
Address: _____
City, State, Zip: _____
Mailing Address: _____
Date of Birth: _____
Education: _____
Occupation: _____
Employer's Name and Address: _____

Date of Hire: _____ Gross Income Per Month: _____
Telephone Numbers: (H) _____ (W) _____
(Cell) _____ (Pgr) _____ (Fax) _____
E-mail Address: _____

2) SPOUSE'S INFORMATION

Name: _____ SS No. _____
Address: _____
City, State, Zip: _____
Date of Birth: _____
Education: _____
Occupation: _____
Employer's Name and Address: _____

Date of Hire: _____ Gross Income Per Month: _____
Telephone Numbers: (H) _____ (W) _____
(Cell) _____ (Pgr) _____ (Fax) _____

3) Date of Marriage: _____ Place: _____

4) Length of Time in Arizona: _____

5) Names, Dates of Birth, and Place of Birth of Children:

Is Wife Presently Pregnant: _____ Est Delivery Date: _____

Addresses Where Children Have Lived for Past Five Years/Persons They Resided With:
(Start With Most Recent Residence)

Dates (From - To Present) Address With Whom Child Resided

_____ Has There Been Any Other Litigation Regarding Custody of Above Listed Minor Children: _____ Are There Any Other Persons Who Have Custody or Claim to Have Custody or Visitation Rights Regarding the Above Listed Minor Children:

6) Property Acquired During Marriage with Either Spouse's Wages (Including but Not Limited to, Insurance, Pension, Stocks, Bonds, Bank Accounts, Automobiles, Real Property, Personal Property, etc.)

Real Property:

_____ Date Purchased: _____ Purchase Price: _____ Current FMV: _____
_____ Date Purchased: _____ Purchase Price: _____ Current FMV: _____

_____ Vehicle(s):

_____ Year _____ Model _____
_____ Year _____ Model _____
_____ Year _____ Model _____

Insurance (Owner, Beneficiary) _____

Name of Life Insurance Co: _____

Term/Whole/Universal: _____

If Whole or Universal: Cash Value _____

Pension (Owner, Beneficiary) _____

Type of Plan: _____

Current Balance: _____

Stocks / Bonds (Owner, Beneficiary) _____

Personal Property (Owner, Beneficiary) _____

Accounts (Owner, Beneficiary) _____

Bank or Financial Institution: _____

Type of Account: _____ Current Balance: _____

Bank or Financial Institution: _____

Type of Account: _____ Current Balance: _____

7) Property Owned Prior to Marriage:

Wife: _____

Husband: _____

8) Property Received During Marriage as a Gift or Inheritance:

Wife: _____

Husband: _____

9) Debts Incurred During Marriage:

Mortgage: Monthly Payment _____ Current Balance Owed _____

Car Payments:

Name of Creditor _____

Monthly Payment _____ Current Balance Owed _____

Name of Creditor _____

Monthly Payment _____ Current Balance Owed _____

Name of Creditor _____

Monthly Payment _____ Current Balance Owed _____

Credit Cards:

Name of Card _____ Current Balance Owed _____

Name of Card _____ Current Balance Owed _____

Name of Card _____ Current Balance Owed _____

Name of Card _____ Current Balance Owed _____

Debts Incurred Prior to Marriage:

Wife: _____

Husband: _____

10) Terms of Any Agreement With Spouse Regarding Temporary Support: Guarantees to Banks, Open Accounts, etc. Signed for Spouse or Others:

—— If Not, Is Temporary Relief Needed: _____

11) Any Agreements With Spouse Regarding Permanent Settlement:

12) Have you entered into a Prenuptial or Postnuptial Agreement with your Husband? _____

13) Please Provide Whatever Other Information You May Deem Important. (Prior Marriages; Child Support or Spousal Maintenance Paid or Received By You or Your Spouse Pertaining to Former Marriage; Health Problems; Employment Problems; Waste of Community Property; Prior Education and Training; Etc.)

14) Does Wife Want Former Name Restored? _____ Former Name: _____

15) Has Last Year's Tax Return Been Filed? Yes _____ No _____
If Yes, State Whether Filed Joint or Separate and How Liability or Refund Was Shared:

16) Intend to File Jointly or Separately for This Year: Yes _____ No _____
a. Give Name and Address of Your Accountant or Tax Lawyer:

17) Referred By: Mr. or Ms. _____ Yellow Pages _____
Other _____