

CLIENT DATA SHEET: PRENUPTIAL AGREEMENT

Return to:

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I. MARRIAGE/ PRE-NUPTIAL AGREEMENT

What is today's date? _____

What is the expected date of marriage? _____

Where will be marriage take place? _____

Have the wedding invitations been sent out? Y or N

What other plans have been made and/or carried out for the wedding?

Do you feel pressured in any way to enter into a prenuptial agreement? Y or N

The Prenuptial Agreement is desired by: _____

Your **main goals** for the prenuptial agreement are as follows:

How do **your goals** differ from your fiancé's goals:

What issues to do you foresee with the negotiation of the prenuptial agreement?

Does your fiancé have an attorney? Y or N

Contact information:

Position: _____

Length of Employment: _____ Approx. Annual Gross Pay: \$ _____

Education:

<u>Level</u>	<u>Graduated?</u> <u>Y or N</u>	<u>Degree</u>	<u>(Anticipated)</u> <u>Date of</u> <u>Graduation</u>	<u>School/</u> <u>University</u>
High School				
Community College				
Undergraduate School				
Graduate School				
Professional School				
Technical School				
Post Doc				

Executed a Last Will and Testament? Y or N Date: _____

B. Future Spouse

Full Legal Name

Formally Known As/Also Known As

Address

City

State

Zip

Phone Number

Email

Date of Birth

Social Security Number

Previous marriages? Y or N

If yes, list terminating event(s) and date(s):

Employer: _____

Position: _____

Length of Employment: _____ Approx. Annual Gross Pay: \$ _____

Education:

<u>Level</u>	<u>Graduated?</u> <u>Y or N</u>	<u>Degree</u>	<u>(Anticipated)</u> <u>Date of</u> <u>Graduation</u>	<u>School/</u> <u>University</u>
High School				
Community College				
Undergraduate School				
Graduate School				
Professional School				
Technical School				
Post Doc				

Executed a Last Will and Testament? Y or N Date: _____

C. Children

1. Child

Full Legal Name

Formally Known As/Also Known As

Address

City

State

Zip

Phone Number

Email

Date of Birth

Social Security Number

Name of Father/Mother

Check: With Future Spouse Illegitimate Prior Marriage Adopted

Check: Male Female

2. Child

Full Legal Name

Formally Known As/Also Known As

Address

City

State

Zip

Phone Number

Email

Date of Birth

Social Security Number

Name of Father/Mother

Check: With Future Spouse Illegitimate Prior Marriage Adopted

Check: Male Female

(Put additional children in an addendum with similar information)

III. SOURCES OF INCOME

A. Client

<u>Source</u>	<u>Type*</u>	<u>Expected this Calendar Year</u>	<u>Amount Last Calendar Year</u>	<u>Amount 2 Calendar Years Ago</u>	<u>Significant Changes Expected</u>

- * S = Salary
- P= Pension
- D= Dividends
- I= Interest
- C= Capital Gains
- T-Trust
- R=Rent
- O= Other

B. Future-Spouse

<u>Source</u>	<u>Type*</u>	<u>Expected this Calendar Year</u>	<u>Amount Last Calendar Year</u>	<u>Amount 2 Calendar Years Ago</u>	<u>Significant Changes Expected</u>

- * S = Salary
- P= Pension
- D= Dividends
- I= Interest
- C= Capital Gains
- T-Trust
- R=Rent
- O= Other

C. ASSETS

A. Real Property

1. Client

<u>Type*</u>	<u>Address</u>	<u>Purchase Date</u>	<u>Purchase Price</u>	<u>FMV</u>	<u>Balance on Mortgage</u>	<u>Title Owner(s)</u>

* R = residence, I= investment/ rental, U = unimproved land, F= farm or ranch, C= commercial property, V = vacation property

2. Future Spouse

<u>Type*</u>	<u>Address</u>	<u>Purchase Date</u>	<u>Purchase Price</u>	<u>FMV</u>	<u>Balance on Mortgage</u>	<u>Title Owner(s)</u>

* R = residence, I= investment/ rental, U = unimproved land, F= farm or ranch, C= commercial property, V = vacation property

B. Stocks and Bonds

1. Stocks

<u>Stock Name</u>	<u>Certificate No.</u>	<u>Address</u>	<u>Title Owner</u>	<u>Stock Value</u>

2. Brokerage Accounts

Brokerage Name	Account No.	Address	Title Owner	Account Value

3. Mutual Funds

Fund Name	Account No.	Address	Title Owner	Fund Value

4. Dividend Reinvestment Plans

DRIP Name	Account No.	Address	Title Owner	Fund Value

5. Commodities

Commodity Name	Account No.	Address	Title Owner	Commodity Value

6. Options

Option Name	Account No.	Address	Title Owner	Option Value

7. Bonds

Type of Bond	Bond Issuer Name	Certificate No.	Address	Title Owner	Bond Value

C. Bank Accounts

Type of Account (Checking, Savings, Money Market)	Bank Name	Account No.	Address	Title Owner	Individual or Joint; In Trust for; Custodian for; Payable on Death to

D. Life Insurance

Name of Insurance Co.	Policy No.	Name of Insured	Owner of Policy	Type of Policy	Value	Primary and Contingent Beneficiaries

E. Annuities

Name of Company	Policy No.	Title Owner	Address	Face Value	Cash Value	Primary and Contingent Beneficiaries

F. Tangible Personal Property

1. Vehicles

Make	Model	Year	Vehicle Identification Number	Title Owner

2. Boats

Make	Model	Year	Vehicle Identification Number	Title Owner

3. Trailers and Other Titled Personal Property

Make	Model	Year	Vehicle Identification Number	Title Owner

4. Antiques/Collectibles

Description	Title Owner	Approximate Value

G. Estate, Trust and other Beneficiary Designations

1. Pending Estates

Decedent's Name	Personal Representative's Name	Address of Personal Representative	Type and Value of Asset to be Inherited	Court in Which Estate is Pending	Case No.

2. Trust Beneficiary Interests

Name of Trust	Name of Trustee	Person Who Created Trust	Date Created	State in Which Created	Current Value

H. Claims and Litigation

Claimant's Name	Assets Subject to the Claim	Court	Case No.

I. Benefits from Social Security, Medicaid, or other Government Programs or Civil or Military Service

1. Social Security Income

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

2. Medicare

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

3. Medicaid Benefits

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

4. Non-Retirement Civil Service Benefits

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

5. Military Retirement Benefits

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

6. Civil Service Retirement Benefits

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

7. Non-Governmental Retirement Benefits

Claimant's Name	Payee's name	Address	Amount of Benefit	Terms of Payment

J. Business Operating Transactions

1. Corporations

Corporation Name	Title Owner	Address	Shares	Value

2. Partnerships

Partnership Name	Title Owner	Address	Shares	Value

3. Sole Proprietorships

Sole Proprietorship Name	Title Owner	Address	Shares	Value

K. Pets

Type of Pet	Title Owner	Address	Name	Age

L. Livestock

Type of Livestock (including Breed)	Registration Name or Title Owner	Location	Description of Pregnant Animals	Approximate FMV