

# DOI/LUKE

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## POSTNUPTIAL QUESTIONNAIRE

DESCRIPTION	WIFE	HUSBAND
FULL LEGAL NAME: FIRST, MIDDLE, LAST (NO INITIALS OR NICKNAMES)		
BIRTH OR MAIDEN NAME		
RESIDENCE ADDRESS: MUST BE STREET ADDRESS, P.O. BOX ADDRESS NOT ACCEPTABLE		
CITY, STATE, ZIP CODE		
HOME PHONE NUMBER		
WORK PHONE NUMBER		
PERSONAL EMAIL		
WORK EMAIL		
CELLULAR NUMBER		
SOCIAL SECURITY NUMBER		
BIRTH DATE		
PLACE OF EMPLOYMENT		
JOB TITLE		
WORK PLACE ADDRESS		
LENGTH OF SERVICE		
WORK SCHEDULE		
GROSS MONTHLY INCOME (BEFORE TAXES)		
OTHER MONTHLY SOURCES OF INCOME (AMOUNT/DESCRIPTION SUCH AS CHILD SUPPORT, 2ND JOB, PART- TIME JOB, MILITARY RESERVES)	\$ DESCRIPTION:	\$ DESCRIPTION:

# ASSETS

## 1. CREDIT UNION ACCOUNTS:

Name of Credit Union	Checking or Savings	Whose Name is Account Under (Husband, Wife, Both)	Loans Against Account	Balance in Account	Who Will Be Awarded Account (Husband, Wife, Both)
				\$	
				\$	
				\$	
				\$	

## 2. BANK ACCOUNTS:

Name & Branch location	Checking or Savings	Whose Name is Account Under (Husband, Wife, Both)	Loans Against Account	Balance in Account	Who Will Be Awarded Account (Husband, Wife, Both)
				\$	
				\$	
				\$	
				\$	

## 3. SECURITIES (Stocks, Bonds, Mutual Funds, Certificates of Deposits, etc)

Name of Company or Investment Company	In Whose name Is Security?	Date acquired/ purchased	Cost when purchased	Current Market Value (if known)	Debt Owed (if any)
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$
			\$	\$	\$

For each security listed above, describe in detail how each security shall be divided between the both of you:

**4. VEHICLES:** (Automobiles, motorcycles, trailers, campers, boats, etc)

Year	Make of vehicle	Vehicle Is Whose Name ( <i>Husband, Wife or Both</i> )	Current Mkt Value	Debt Owing	Who Will Be Awarded Car ( <i>Husband, Wife or Both</i> )
			\$	\$	
			\$	\$	
			\$	\$	

**5. REAL PROPERTY:**

Please be advised that should title or ownership of any real property be changed or transferred, there will be additional fees and costs to prepare and draft any legal documents pertaining to the transfer of ownership for real property.

Address	Owners	Purchase Date	Purchase Price	All Debt Owing	Market Value	Fee or Lease
			\$	\$	\$	
			\$	\$	\$	
			\$	\$	\$	

For real property above, describe what will happen to the real property and any mortgages/debts secured on the real property.

**6. LIFE INSURANCE:**

Company	Person Insured	Face Value	Beneficiary	In Whose Name Is The Insurance In ( <i>Husband, Wife or Both</i> )	Cash Value	Debt Against Life Insurance
		\$			\$	\$
		\$			\$	\$
		\$			\$	\$
		\$			\$	\$

For life insurance above, describe how the insurance will be dealt with:

**7. RETIREMENT, 401K, DEFERRED COMPENSATION, IRAS, PENSION, PROFIT SHARING ACCOUNTS:**

If each party will be awarded his/her own share of the other party's retirement, his/her portion is based upon the number of years of marriage and number of years that person was in the retirement plan. Another option is each party keeps their own retirement. If a QUALIFIED DOMESTIC RELATIONS ORDER (QDRO) is required by the administrator of the retirement plan to transfer any portion of the retirement, you must retain the legal services of an attorney who does prepare these documents. OUR FIRM DOES NOT PREPARE ANY QDROS. However, no QDRO is require if each party will take their own retirement.

Employer/Company	Acct in Whose Name?	Type of Plan (401(k), etc)	Years in Plan	Total Value
				\$
				\$
				\$
				\$
				\$

For each retirement, pension, profit sharing, account listed above, describe what will occur to each one:

**8. ALL OTHER MAJOR ASSETS: (furniture, household effects, art, stamps, coins, tools, equipment, jewelry, accounts receivable, investment assets, business assets, cemetery plots, or niches, tax refunds due, etc.)**

General Description	In Whose Name Is The Asset (Husband, Wife, Other)	Value (Estimate)	Debt Owed If Any	Who Will Keep Asset (Husband, Wife, Other)
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	

**9. PROPERTY HELD IN TRUST FOR OR BY THIRD PERSONS**

Description	Trustee(s)	Beneficiaries	Value	Debt Owed
			\$	\$

			\$	\$
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**10. ALL OUTSTANDING DEBTS:**

(Car loans, mortgages, home equity loans, personal loans, credit cards, lines of credit, business loans)

Creditor Name	Debtor (Husband, Wife, Joint)	Security (ie Car)	When Debt Incurred	Total Balance Owed	Minimum Monthly Payment	Who Will Pay Debt? (Wife, Husband, Both)
				\$	\$	
				\$	\$	
				\$	\$	
				\$	\$	
				\$	\$	

**11. ATTACH A COPY OF YOU AND YOUR SPOUSES MOST RECENT PAY STUBS HERE WHEN RETURNING THIS QUESTIONNAIRE TO OUR OFFICE.**

**12. YOUR MONTHLY EXPENSES: Estimate amounts to the best of your ability**

DESCRIPTION	MONTHLY AMOUNT
RENT, MORTGAGE, AGREEMENT OF SALE	\$
MAINTENANCE FEES	\$
INSURANCE FOR PROPERTY (IF ANY)	\$
UTILITIES: GAS, WATER, ELECTRICITY, TELEPHONE, CABLE, ETC. (TOTAL)	\$
CAR PAYMENTS, LEASE AMOUNT, RENTAL	\$
INSURANCE ON VEHICLES	\$
VEHICLE MAINTENANCE (REPAIRS)	\$
GAS	\$
TOTAL OF ALL ABOVE:	\$

COMMENTS:

**13. YOUR MONTHLY PERSONAL EXPENSES:**

<b>DESCRIPTION</b>	<b>YOURSELF</b>	<b>CHILDREN</b>
FOOD	\$	\$
CLOTHING	\$	\$
MEDICAL AND DENTAL PREMIUMS	\$	\$
LAUNDRY AND CLEANING	\$	\$
PERSONAL ARTICLES	\$	\$
RECREATION	\$	\$
SCHOOL PROGRAMS (A+, AFTER-SCHOOL CARE, BABY SITTERS)	\$	\$
SCHOOL LUNCH MONEY	\$	\$
PRIVATE SCHOOL TUITION/EXPENSES/TRANSPORTATION	\$	\$
HOUSEHOLD ITEMS	\$	\$
BUS	\$	\$
CELLULAR PHONE, PAGER AND INTERNET FEES	\$	\$
OTHER MONTHLY EXPENSES: NEWSPAPER AND MAGAZINE SUBSCRIPTION, DONATIONS TO CHURCH/CHARITY	\$	\$
OTHER MONTHLY EXPENSES/BILLS:	\$	\$
EXTRACURRICULAR ACTIVITIES FOR CHILDREN (HOBBIES, SPORTS, LESSONS, TUTORING, ETC.)	\$	\$
TOTAL OF TABLE #17 & TABLE #18:	\$	\$

COMMENTS: