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PREMARITAL AGREEMENT – QUESTIONNAIRE

BASIC INFORMATION: separate sets of pages 1-4 should be filled out for each party.

FULL LEGAL NAME: FIRST, MIDDLE, LAST (NO INITIALS OR NICKNAMES)	
BIRTH OR MAIDEN NAME	
RESIDENCE ADDRESS: (MUST BE STREET ADDRESS)	
HOME/WORK PHONE NUMBERS	
EMAIL ADDRESS	
SOCIAL SECURITY NUMBER	
BIRTH DATE	
PLACE OF EMPLOYMENT	
JOB TITLE	
WORK PLACE ADDRESS	
GROSS MONTHLY INCOME (BEFORE TAXES)	
OTHER MONTHLY SOURCES OF INCOME	
NAME OF FIANCÉ/FIANCÉE	
EXPECTED WEDDING DATE	

CHILDREN:

Child's Full Name (<i>first, middle, last</i>)	M/F	Age	Residence

COMMENTS:

ASSETS

(For notation purposes, "Husband" or "H" indicates groom/fiancé, and "Wife" or "W" indicates bride/fiancee)

1. CREDIT UNION ACCOUNTS:

Name of Credit Union	Checking or Savings	Name on Account	Loans Against Account	Balance in Account

2. BANK ACCOUNTS:

Name & Branch location	Checking or Savings	Name on Account	Loans Against Account	Balance in Account

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

Name of Company or Investment Company	Name on Account	Date acquired/ purchased	Cost when purchased	Market Value (if known)	Debt Owed (if any)

COMMENTS:

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

Year	Make of vehicle	Title in Whose Name	Current Mkt Value	Debt Owning

5. REAL PROPERTY:

Address	Owners	Purchase Date	Purchase Price	All Debt Owning	Market Value	Fee or Lease

6. LIFE INSURANCE:

Company	Person Insured	Face Value	Beneficiary	Name on Account	Cash Value	Debt Against Insurance

7. RETIREMENT, PENSION, PROFIT SHARING ACCOUNTS:

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

COMMENTS:

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)

9. PROPERTY HELD IN TRUST FOR OR BY THIRD PERSONS

Description	Trustee(s)	Beneficiaries	Value	Debt Owed (If Any)

10. ALL OUTSTANDING DEBTS:
(Car loans, mortgages, home equity loans, personal loans, credit cards, lines of credit, business loans)

Creditor Name	Name on Debt (borrower)	Security (i.e. car, home)	When Debt Incurred	Total Balance Owed

COMMENTS:

PRELIMINARY QUESTIONS

1. What do you wish to happen to pre-marital property in the event of a divorce?

2. What do you wish to happen to any increases in value of pre-marital property in the event of a divorce?

3. What do you wish to happen to gifts or inheritances that either of you receives individually, in the event of a divorce?

4. What do you wish to happen to increases in value of gifts or inheritances that either of you receives individually, in the event of a divorce?

5. What do you wish to happen to property acquired during the marriage, in the event of a divorce?

6. What do you wish regarding alimony in the event of a divorce?

7. Do you currently have a will, trust, or other estate-planning document?

HOW DID YOU COME TO HEAR ABOUT OUR OFFICE? (please choose one)

- _____ Referral (name of person who referred you _____)
- _____ Internet search (which search engine? _____)
What search words/query did you use? _____
- _____ Social media -- which one? _____
- _____ Lawyer Referral Services
- _____ Other: