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Date:

Referred by:

Interview Sheet
I. General Information

CLIENT:

Name:

[Maiden Name]

Mailing address (include city, state, and zip code):

County of residence:

Home Telephone:

Cell Phone:

Business Telephone:

E-mail Address:

Age:

Date of Birth:

Social Security No:

Born at:

Grew up at:

Religious and church or synagogue affiliation, if any:

Education:

Specify highest degree and school attended:

Number of previous marriages:

Approximate dates of marriage and termination (indicate by death or divorce):

List the names and ages of any children by previous marriage:

List the names of children of previous marriage currently living at home or being supported by you:

SPOUSE:

Name:

[Maiden Name]

Mailing address (include city, state, and zip code):

County of residence:

Home Telephone:

Business Telephone:

E-mail address:

Age:

Date of Birth:

Social Security No:

Born at:

Grew up at:

Religious and church or synagogue affiliation, if any:

Education:

Specify highest degree and school attended:

Number of previous marriages:

Approximate dates of marriage and termination (indicate by death or divorce):

List the names and ages of any children by previous marriage:

List the names of children of previous marriage currently living at home or being supported by you:

II. INFORMATION CONCERNING PRESENT MARRIAGE

- A. Date of marriage:
City, County, & State where marriage took place:

- B. Date of separation: (This is ordinarily the last time you slept in the same room and/or had sexual intercourse, whichever occurred last. If you are living in the same residence, state any plans to move:

- C. Children of this marriage:

Name	Sex	Assets	Date of Birth	Age
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- D. List the names of the persons with whom the children lived during the past five years and the addresses where they lived during the past five years:

Parties	Addresses
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- E. List any health problems of the children:

III. WORK EXPERIENCE

CLIENT:

Current of last employer:

Position:

Dates of employment:

Past Employment and approximate dates:

Your current salary and/or other forms of compensation:

List perquisites and amounts:

List all amounts and sources of other income:

SPOUSE:

Current of last employer:

Position:

Dates of employment:

Past Employment and approximate dates:

Your current salary and/or other forms of compensation:

List perquisites and amounts:

List all amounts and sources of other income:

IV. ASSETS

A. Home:

Address:

City and State:

Year of purchase:

Purchase Price:

Down payment:

Out of funds from:

Balance owed:

First mortgage:

Second Mortgage:

Name of bank or other lender:

Name of bank or other lender:

List any other financing:

Property is in the name(s) of:

Current value of home and lot:

B. Previous Homes:

List how each was titled and approximate equity received:

C. Other real estate:

1. Address: City and State

Year of purchase: Purchase Price

Down Payment: Out of funds from:

Balance owed

First mortgage:

Second Mortgage:

Name of bank or other lender:

Name of bank or other lender:

List any other financing:

Property is in the name(s) of:

Current value of home and lot:

2. Address: City and State

Year of purchase: Purchase Price

Down Payment: Out of funds from:

Balance owed

First mortgage:

Second Mortgage:

Name of bank or other lender:

Name of bank or other lender:

List any other financing:

Property is in the name(s) of:

Current value of home and lot:

List any other real estate holdings:

E. Stocks, bonds, and other securities:

List holdings by account, names, and approximate values or approximate value of each and how titled:

F. IRAs and Retirement Plans:

List all retirement plans, pension, and profit sharing plans, 401k plans, Keough plans, and all IRAs, providing the names of each, how titled, and approximate value:

G. Other:

List all other assets, including boats, certificates of deposit, coins, etc.:

V. PRE-MARTIAL ASSETS

List all real estate, stocks, bonds, securities, cash, and any other assets of significant value that you or your spouse owned prior to your current marriage, the value of each, and show whether it was yours or your spouse's pre-marital asset:

VI. AUTOMOBILES

1. Year Make and model:
How titled:

Purchase price: Financed Leased through:

2. Year Make and model:
How titled:

Purchase price: Financed Leased through:

3. Year Make and model:
How titled:

Purchase price: Financed Leased through:

VII. BANK ACCOUNTS

1. Checking account:

Joint or Separate
Balance:
Account No.
In the name of:

2. Checking account:

Joint or Separate
Balance:
Account No.
In the name of:

3. Savings account:

Joint or Separate
Balance:
Account No.
In the name of:

VIII. DEBTS

<u>Creditor</u>	<u>Current Balance</u>	<u>Monthly Payment</u>	<u>Purpose of debt</u>	<u>Party</u>
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IX. INSURANCE

- A. On house:
Company &/or Agent
- B. On household goods & furnishings:
Company &/or agent:
- C. On automobiles:
Company &/or agent:
- D. Medical Coverage:

Yours:
Policy No.
Insurance Co.
Group No.
Name of dependents:

Spouse's:
Yours:
Policy No.
Insurance Co.
Group No.
Name of dependents:

D. Life Insurance:

Owner:
The insured:
Insurance company:
Policy number:
Amount:
Cash value (if any):
Beneficiaries:

Owner:
The insured:
Insurance company:
Policy number:
Amount:
Cash value (if any):
Beneficiaries:

Owner:
The insured:
Insurance company:
Policy number:
Amount:
Cash value (if any):
Beneficiaries:

X. COUNSELING

A. Name and address of any counselor (psychiatrist, psychologist, MSW, M.Ed., clergy, etc.)

For Yourself

For Your Spouse

B. Purpose of counseling:

C. Specific recommendations of counselor:

D. Time period and frequency of visits (weekly, bi-weekly, etc.)

XI. HEALTH

Describe each party's health and any operations, hospitalizations, major drugs used, which you deem to be significant:

XII. CAUSES OF SEPARATION

Detail why you are seeking a divorce and/or causes of the separation.

XIII. CUSTODY

Are you seeking custody of your children?

Do you believe there will be a contest over custody/visitation rights?

If yes, describe reasons why you should have custody or unrestricted visitation and why your spouse should not have custody or why spouse's visitation should be limited: