

**PRENUPTIAL AGREEMENT INTAKE FORM**

**CLIENT INFORMATION**

Full legal name: \_\_\_\_\_

Current address: \_\_\_\_\_

Maiden Name (if applicable): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Current phone number: \_\_\_\_\_

Cell phone number (if different): \_\_\_\_\_

Email: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Place of birth: \_\_\_\_\_

**INTENDED SPOUSE'S INFORMATION**

Is your intended spouse represented by an attorney?

Would you like me to refer an attorney for your intended spouse to have the agreement reviewed?

If yes, please list the name, telephone number and address of Attorney:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Full legal name: \_\_\_\_\_

Current address: \_\_\_\_\_

Maiden Name (if applicable): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Current phone number: \_\_\_\_\_

Cell phone number (if different): \_\_\_\_\_

Email: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Place of birth: \_\_\_\_\_

**GENERAL INFORMATION:**

When do you intend to marry?

Have you lived together?

If so, for how long?

Do you wish to enter a prenuptial agreement in order to:

Address assets you expect to inherit or receive as a gift? \_\_\_\_\_

Address assets in the event of divorce? \_\_\_\_\_

Address assets for a child? \_\_\_\_\_

Address the distribution of assets in the event of death? \_\_\_\_\_

Do either of you have a Last Will or Testament?

**PLEASE NOTE: In making a prenuptial agreement, each person has to make a full and complete financial disclosure to the other. The information contained in this form will be disclosed to the other spouse. If there are any assets not specifically identified in this form, please include those assets at the end.**

**FINANCIAL INFORMATION:**

Husband's occupation:

Employer:

Monthly Gross Income (before taxes):

Monthly Net Income (after taxes):

Highest level of education:

How long have you been employed in this profession?

Please describe any additional income:

Health issues of Husband:

Wife's occupation:

Employer:

Monthly Gross Income (before taxes):

Monthly Net Income (after taxes):

Highest level of education:

How long have you been employed in this profession?

Please describe any additional income:

Health issues of Wife:

**REAL ESTATE:**

Does either party currently own a house or a vacation house?

Husband: When was it purchased?      Address?

How did the party who own the property pay the down payment? (was there a family gift or did you draw from a specific account?)

Estimated fair market value:

Current Balance:

Wife: When was it purchased?      Address?

How did the party who own the property pay the down payment? (was there a family gift or did you draw from a specific account?)

Estimated fair market value:

Current Balance:

**VEHICLES:**

Husband's:	Year	Make and Model	Used by	Value	Amt. Owed
------------	------	----------------	---------	-------	-----------

Wife's:	Year	Make and Model	Used by	Value	Amt. Owed
---------	------	----------------	---------	-------	-----------

---

VALUABLES: Please list any collections, jewelry, antiques, collectibles or other valuables owned by you or your intended spouse:

Item	Estimated Value
-----	-----
Item	Estimated Value
-----	-----
Item	Estimated Value
-----	-----
Item	Estimated Value
-----	-----

DEBTS

Husband:

Creditor	Last 4 of Acct#	Amount
Creditor	Last 4 of Acct#	Amount
Creditor	Last 4 of Acct#	Amount
Creditor	Last 4 of Acct#	Amount

Wife:

Creditor	Last 4 of Acct#	Amount
Creditor	Last 4 of Acct#	Amount
Creditor	Last 4 of Acct#	Amount
Creditor	Last 4 of Acct#	Amount

---

BANK ACCOUNTS

**Bank/institution / Last 4 of Acct#:** \_\_\_\_\_

Type of account: (checking, savings, money market, CD, mutual fund, etc.) \_\_\_\_\_

Name on Account: \_\_\_\_\_

Current balance: \_\_\_\_\_

**Bank/institution/ Last 4 of Acct#:** \_\_\_\_\_

Type of account: (checking, savings, money market, CD, mutual fund, etc.) \_\_\_\_\_

Name on Account: \_\_\_\_\_

Current balance: \_\_\_\_\_

**Bank/institution/ Last 4 of Acct#:** \_\_\_\_\_

Type of account: (checking, savings, money market, CD, mutual fund, etc.) \_\_\_\_\_

Name on Account: \_\_\_\_\_

Current balance: \_\_\_\_\_

**Bank/institution/ Last 4 of Acct#:** \_\_\_\_\_

Type of account: (checking, savings, money market, CD, mutual fund, etc.) \_\_\_\_\_

Name on Account: \_\_\_\_\_

Current balance: \_\_\_\_\_

STOCKS AND BONDS:

Husband:

Name of Company: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Value: \_\_\_\_\_

Wife:

Name of Company: \_\_\_\_\_

Number of Shares: \_\_\_\_\_ Value: \_\_\_\_\_



PENSIONS, STOCK PURCHASE PLANS AND OTHER INVESTMENT ACCOUNTS:

**Type of Account:(SEP, Keogh, IRA, pension, etc.)** \_\_\_\_\_

Name on the account (participant): \_\_\_\_\_

Name of Fund Administrator: \_\_\_\_\_

Address:

Account Number: \_\_\_\_\_

Balance: \_\_\_\_\_

**Type of Account: (SEP, Keogh, IRA, pension, etc.)** \_\_\_\_\_

Name on the account (participant): \_\_\_\_\_

Name of Fund Administrator: \_\_\_\_\_

Address:

Account Number: \_\_\_\_\_

Balance: \_\_\_\_\_

**Type of Account: (SEP, Keogh, IRA, pension, etc.)** \_\_\_\_\_

Name on the account (participant): \_\_\_\_\_

Name of Fund Administrator: \_\_\_\_\_

Address:

Account Number: \_\_\_\_\_

Balance: \_\_\_\_\_

**Type of Account: (SEP, Keogh, IRA, pension, etc.)** \_\_\_\_\_

Name on the account (participant): \_\_\_\_\_

Name of Fund Administrator: \_\_\_\_\_

Address:

Account Number: \_\_\_\_\_

Balance: \_\_\_\_\_

---

LIFE INSURANCE POLICIES

Current life insurance policy owned by Husband:

Beneficiary:

Premium Amount:

Policy Amount:

Policy Type:

Company Name:

Policy Number:

Current life insurance policy owned by Wife:

Beneficiary:

Premium Amount:

Policy Amount:

Policy Type:

Company Name:

Policy Number:

BUSINESS (Incorporated or Sole Proprietorship):

Name of Husband's Business: \_\_\_\_\_

Address: \_\_\_\_\_

Years in Business: \_\_\_\_\_

Type of Business: \_\_\_\_\_

Value of Business: \_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_

Name of Wife's Business: \_\_\_\_\_

Address: \_\_\_\_\_

Years in Business: \_\_\_\_\_

Type of Business: \_\_\_\_\_

Value of Business: \_\_\_\_\_

Percentage of Ownership: \_\_\_\_\_

Please list any other assets:

---