

FAMILY LAW QUESTIONNAIRE

BACKGROUND INFORMATION

Your name: _____

Home address: _____

Email address: _____

Phone numbers(s): _____ (home) _____ (cell)
_____ (work)

Your date of birth: _____

Social Security number: _____

Your education level: _____

Employer's name: _____

Job title: _____

Date Employed/started: _____

Yearly salary: _____

Health insurance provider: _____

Are you a member of the U.S. Armed Forces: yes or no? _____ If so, please state branch:

Any history of PFA/CYS involvement? yes or no? If so, please explain: _____

SPOUSE'S INFORMATION (IF APPLICABLE)

Spouse's name: _____

Spouse's date of birth: _____

Spouse's Social Security number: _____

Spouse's education level: _____

Is your spouse a member of the U.S. Armed Forces: yes or no? _____ If so, please state branch:

Spouse's Employer: _____

Spouse's Job Title: _____

Date Employed/started: _____

Spouse's Yearly Salary: _____

DIVORCE CLIENTS ONLY

Date of marriage: _____

Place of marriage: _____

Date of separation: _____

Reason seeking divorce: _____

Children of the marriage: yes or no?: _____

CHILD(REN)'S INFORMATION (IF APPLICABLE)

Child(ren)'s name(s):

Child(ren)'s date(s) of birth:

Was the child(ren) born out of wedlock: yes or no? _____

Health condition(s) of child(ren): _____

Name, address, and relationship of adults that child is residing with: _____

Addresses where the child has resided for the past five (5) years: _____

Child's school district(s) and dates of attendance: _____

Child's health insurance provider(s): _____

Parent's names and addresses: _____

Custody order in effect: yes or no? _____ Date of order: _____

Current custody schedule: _____

Docket number and county of custody matter (if applicable): _____

ASSETS (IF APPLICABLE)

We have attempted to be comprehensive in categorizing assets; you may find many categories inapplicable to you. If you need additional space, please attach additional sheets or copy the page(s) where additional space is needed.

Cash and Liquid Assets

You should list checking accounts, savings accounts, money market accounts, and certificates of deposits here.

<i>Institution Where Acct. is Maintained</i>	<i>Estimated Balance</i>	<i>How Acct. is Titled</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Marketable Securities and Investments

You should list stocks, bonds, mutual funds, and similar investments which are readily bought and sold here.

<i>General Description</i>	<i>Estimated Value</i>	<i>How Acct. is Titled</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Closely Held Business Interests

To be included here are closely held business interests such as stock, partnership interests, and proprietorship interests. These types of assets are generally extremely difficult to value.

Name of business: _____

Organization type (partnership, corporation): _____

Brief description of business: _____

Your percentage interest: _____

How your interest is titled (joint, sole ownership): _____

Your estimate of value of business: _____

Your estimate of value of your interest in business: _____

Name of co-owner(s) (if applicable): _____

Residential Real Estate

Here you should list your primary residence and any other residences or vacation homes.

<i>Address</i>	<i>Estimated Value</i>	<i>Mortgage Amt.</i>	<i>How Residence is Titled</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Real Estate

Here you should list any other real estate, such as rental properties, which you own.

<i>Address</i>	<i>Estimated Value</i>	<i>Mortgage Amt.</i>	<i>How Residence is Titled</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Pension Plans, IRAs, and Profit-Sharing Plans

You should include the value of your account in all tax qualified or non-qualified retirement benefit plans which you or your employer maintains.

Your plan(s):

<i>Type of Plan</i>	<i>Maintained by</i>	<i>Estimated Balance</i>	<i>Beneficiary</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Spouse’s plan(s) (if applicable):

<i>Type of Plan</i>	<i>Maintained by</i>	<i>Estimated Balance</i>	<i>Beneficiary</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Life Insurance

You should provide as complete information as you can about insurance.

Your life insurance:

<i>Insurer</i>	<i>Policy #</i>	<i>Cash Value</i>	<i>Owner</i>	<i>Death Benefit</i>	<i>Beneficiary</i>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Spouse’s life insurance (if applicable):

<i>Insurer</i>	<i>Policy #</i>	<i>Cash Value</i>	<i>Owner</i>	<i>Death Benefit</i>	<i>Beneficiary</i>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Joint insurance with spouse (if applicable):

<i>Insurer</i>	<i>Policy #</i>	<i>Cash Value</i>	<i>Owner</i>	<i>Death Benefit</i>	<i>Beneficiary</i>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Annuities

Please list any annuities which you or your spouse own.

<i>Owner</i>	<i>Policy #</i>	<i>Value</i>	<i>Beneficiary</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Household Furniture, Furnishing, and Other Personal Property

You do not need to list all items. However, you should note items or collections of special worth.

<i>Description</i>	<i>Estimated Value</i>	<i>How Prop. is Titled (if applicable)</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Vehicles

Please list any vehicles which you or your spouse own, including but not limited to vehicles, boats, RV's, campers, race cars, etc.

<i>Year/Make/Model</i>	<i>Lien? Y or N</i>	<i>Lien Amount</i>	<i>How Vehicle is Titled</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Assets

This questionnaire is designed to help value and categorize your assets. If there are any assets which do not fit into any of the above-described categories, please describe them here.

<i>Description</i>	<i>Estimated Value</i>	<i>How Acct. is Titled (if app.)</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

LIABILITIES (IF APPLICABLE)

Under the real estate categories, we asked you to provide information about your mortgages. If you have other debt, or have guaranteed the debt of others (such as a closely held business), please briefly describe the indebtedness here to include credit cards, personal loans, signature loans, etc.

<i>Name of Creditor</i>	<i>Amount of Debt</i>	<i>Co-Debtor? Y or N.</i>	<i>Payment Due Date</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

PROFESSIONAL ADVISORS (IF APPLICABLE)

It may be necessary to consult with your other professional advisors, if any.

Accountant	Name: _____
	Firm: _____
	Address: _____
	Phone #: _____ Email address: _____
Insurance Agent	Name: _____
	Firm: _____
	Address: _____
	Phone #: _____ Email address: _____
Financial Planner	Name: _____
	Firm: _____
	Address: _____
	Phone #: _____ Email address: _____

OTHER CONCERNS

If there are other matters which you wish to discuss with us which are not identified elsewhere in this questionnaire, please address them here:

CLIENT CHECKLIST

Please provide Daley Zucker with the following information at your earliest convenience.

- Copy of your recent paystubs
- Copy of your spouse's recent paystubs
- Copy of tax returns for the past three (3) years
- Copy of the deed to your home
- Copy of deeds to other properties
- Copy of vehicle titles or registrations
- Copy of statements for:
 - Mortgage(s)
 - Credit card(s)
 - Loan(s)
- Copy of agreement of sale
- Copy of tuition bills
- Copy of other bills
- Completed Income and Expense form (attached)
- Copy of bank statements
- Copy of stock certificates
- Copy of pension statements
- Copy of 401(k) or savings plan statements
- Copy of savings bonds
- Other