PERSONAL INFORMATION WORKSHEET AND QUESTIONNAIRE

Personal Information Worksheet For Premarital Agreement

Please provide the information requested below. This questionnaire is divided into two parts. The first part asks for personal information about you and your fiancé(e). The second part asks for information about your financial affairs. Your responses will help us understand your objectives and evaluate your needs. The information you provide us, including the answers to the questions below, is confidential, meaning we will not share it with your fiancé(e), or with his or her attorney, unless you authorize us to do so.

Today's Da	Today's Date:								
Expected date of marriage:									
Marriage will take place at:									
Who referre	d you:								
ABOUT MYSELF									
1. Name:									
2. Social se	curity number:								
3.	Phone Numbers	O.K. to pho	ne here?						
		Yes	No						
Home									
Do you have	e caller ID on home phone?								
Work									
Mobile									

Other																
						(Call before sending fax?					?				
											Y	es		No		
Work Fax																
Home Fax																
4. Sex		Age:			P	lace	e of	Birth:								
Date of Bir	th:															
Country(ies	s) of o	citizei	ısh	ip:												
5. Address	es									Is this e-mail address password protected?						
													Y	es	1	No
Work e-ma	il:														[
Home e-ma	uil:														[
Other e-ma	il:														[
Mailing add	dress	•														
Should this Personal & tial?		fiden-														
Residential	addr	ess (i	f di	iffe	rer	nt):										
County/stat	e of	reside	nc	e:												
How long r	eside	ent of	sta	te (ye	ars/	/mor	nths):								
6. Former	name	e(s):														
7.																
Employer:												ositi ecup				
Address:																
						Length of this employment:										

			_				Usual work days/times:			
						Approx monthly gross p	y			
0 XX 14 11	<u> </u>	1 . 1		• •	•					
8. Health problem	ns for w	which s	ре	ecial at	tentio	or care is	ne	ecessary:		
9. Education:										
Level	Gradu Yes			Degree ype/sul	oject	Date		School		
High School										
Undergraduate										
Graduate/Prof.										
Doctorate										
Post Doc										
				Yes	No	Type of degree seeking		Expected date of graduation		

						1	,
Are y	ou currentl	y in scł	nool?				
10. I	was marrie	edt	times before th	is marriage.			
				Date marriag	How terminated (death, di-		
1	Former Sp	ouse N	lame	terminated		vorce)	
1.							
2.							
3.							
4.							
5.							
11. F	or each chi	ıld born	to or adopted	by you:			
				With whom d	1000		
Name	2	Age	Birth date	child reside?		School	Grade
12. F	inancial ob	oligation	ns to former sp	ouse(s)/childro	en:		

13. Names and ages of any children of this relationship:

Name	Age	Birth date	With whom does child reside?	School	Grade		
14. Major (nonroutine) financial obligations to children of current relationship (e.g., college expenses):							
15 W:11a	dt.	to mlammin as					

15. W	ills and estate planning:
	I do not have a will.
	I have a will executed on (date):
	I have the following estate planning arrangements in place (e.g., annual cash gifts, revocable or irrevocable trust; life insurance trust, etc.):
	I have an estate planning attorney (Name):
	I do not have an estate planning attorney.

ABOUT MY FIANCÉ(E)	
16. Name:	
17. Social security number:	

18.	Phone Numbers			Note: We will not contact your fiancé(e) if he/she is				
Home				rep	resented by couns	el.		
Does your fiancé(e) have caller ID on home phone? ☐ Yes ☐ No								
Work								
Mobile								
Other								
				Cal	ll before sending f	ax?		
			T		Yes	No		
Work Fax								
Home Fax								
19. Sex	Age:		Date of Bir	Sirth: Place of Birth:				
					·			
20. Country	y(ies) of citiz	enshi	p:					
If not U.S. c	citizen, what	is imı	nigration sta	ıtus?				
21. Address	ses							
W	ork e-mail:							
Н	ome e-mail:							
O	ther e-mail:							
Mail	ling address:				Residential addre	ess:		
Should this Personal &								
tial?	☐ Yes							

22. County/	'state	of resi	dence:							
How long re	esiden	nt of sta	ate:							
23. Former	name	e(s):								
					I					1
24. Health p	proble	ems fo	r whic	h spe	cial at	tention	or care	is ne	ecess	ary:
25. Education	on:									
Level		Gradu Yes	iate? No	Deg	ree ty	pe/subj	ect	Date	e	School
High School										
Undergradua	ate									
Graduate/Pr	of.									
Doctorate										
Post Doc					T	T	T		1	
					Yes	No	Type of degree seekin	;	date	ected of duation
Is fiancé(e) of in school?	curre	ntly								
26. Fiancé(e	e) cur	rently	has an	atto	rney?	□ Ye	es 🗆 1	No		
27. If yes, li	ist co	ntact ii	nforma	ition	for op	posing	counse	l if kı	nowi	n:
	A	Attorne	ey's na	me:						
			Fi	rm:						

		Addre	ss:					
		DI						
		Pho	ne:					
28. My fian	cé(e) was m	arried	times b	pefore the marr	riage.			
	Former Spo	ouse Na	ame	Date mar- riage termi- nated	How te	How terminated (death, divorce)		
29. For each lowing:	h child born	or ado	pted into p	orevious marria	ige(s), lis	t the fol-		
10 Willig.								
			<u> </u>					
Name		Age	Birth date	With whom does child reside?	School	Grade		
30. Financia	al obligation	s to for	rmer spous	e(s), children:				
	-		-					

ABOUT THE MARRIAGE								
31. Date:		Place:						
What plans have already been made and/or carried out:								
ABOUT THE PREMARITAL	AGREEM	ENT						
32. Premarital agreement is des	ired by:							
Me	Fiancé(e)		Both	Other				
If other, please explain:								
33. My objectives in seeking a p	premarital ag	greement are	e:					

34. My fiancé(e)'s objectives in seeking a premarital agreement are:
35. I foresee the following problems in dealing with my fiancé(e) regarding a premarital agreement:
36. I have some questions and issues I would like to explore as follows:

37. I have already made some decisions about the terms I want included in a premarital agreement, as follows:

FINANCIAL DISCLOSURE

Parties entering into a premarital agreement should make disclosure of all assets, liabilities, and sources and amounts of income. In some states such disclosure is mandatory. In others, it may or may not be required. The safest course of action is to make full disclosure. A failure to do so may render the agreement unenforceable. You will have an opportunity to discuss with us any concerns you may have about the extent of the disclosure required to create an enforceable agreement in your particular case.

Please provide us with full and complete information about your financial circumstances. You may use the worksheet that begins on the following page if you wish. Also, please provide us with your fiancé(e)'s financial disclosure, if possible. He/she may use the attached worksheet as well.

ASSETS	S AND DEBTS WORKSHEET		
Name:		Date:	

1. Amounts and Sources of Income:								
Source	Type*	Expected amt. this calendar year	Amt. last calendar year	Amt. 2 calendar years ago	Significar changes expected			

* S = salary; P = pension; D = dividends; I = interest; C = capital gains; T = trust; R = rent; O = other

2. Real	2. Real Estate:							
Type**	Address	Date pur-chased	Price	Cur- rent value	Balance owed on mortgage	How titled?		

** R = residence, I = investment/rental, U = unimproved land, F = farm or ranch, C = commercial property, V = vacation property (non-rental)

3. Automobiles and other motor vehicles (including motorcycles, RVs, motorboats):

How titled?	Year	Make & model	Amount owed	Current value

4. Personal property: Identify items of special monetary or sentimental value and then aggregate remaining items into general categories such as furniture, furnishings, books, sports and hobby equipment, etc.

Description	Date of acquisition	Pur- chase price	Amount of lien, if any	Fair market val- ue

5. Cash (checking, savings credit union, money market, Treasury bills, CDs, etc.)

How titled?	Name of	T	Balance as	Held in pay-on- death or other
joint owners/%	financial	Type of ac-	of	survivorship
of interest?	institution	count	[date]	form?
		_		

6. Defined contribution retirement plans (e.g., IRA, SEP-IRA, 401(k), profit sharing, ESOP, federal TSP, 403(b), other)

Participation date	Financial institution/Name of plan administrator	Type of plan or account	Current value	Valuation date	Name of current benefi- ciary

7. Defined benefit pension plans (e.g., private sector pension plan, CSRS, FERS, military, Foreign Service, state or other government, international organization)

Participation date	Sponsoring entity (e.g., company, un- ion, govern- ment or organi- zation)	Name of plan	Accrued benefit	Date eligible for retirement	Name of current beneficiary

8. Other deferred compensation plans or benefits (e.g., stock options, stock bonus, stock awards, supplemental retirement plans, restricted shares)

Sponsoring entity (e.g., company, union, government or organization)	Type of benefit	Number of shares or units	Present value	Valua- tion date	Name of current beneficiary

9. Are any of your retirement benefits subject to the rights of a former
spouse? If yes, please provide particulars and a copy of the court order:

10.	Securities	(mutual	funds,	bonds,	limited	partnerships,	stocks)	or e	ıttach

account statement.

Name of other owners; % of interest	Broker/Name of fund/Name of company	Description (# of shares, % interest)	Current value	Valuation date

11. Life insu	rance polic	cies:					
Name of insurance company	Policy no.	Type (whole life, term)	Death bene- fit	Annual premium	Cash value	Name of current benefi- ciary	
					<u> </u>		
12. Business interests. Describe any interest in any business, professional practice, or corporation, giving approximate value of interest where possible:							
13. Are you the beneficiary of any trusts or estates? If yes, please provide details:							
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14. Do you regularly receive substantial gifts from, or make substantial
gifts to, a family member (e.g., an annual gift of cash or property valued at \$13,000 or more)? If so, please provide details:
5 - 7
15. Do you expect any significant change in your assets over the next
three years (e.g., an inheritance, distribution from a trust, sale of a business)? If so, please explain:
ness): If so, please explain.

16. Unsecured debts (e.g., credit cards, lines of credit, personal loans, student loans)

Creditor	Co-obligor	Type of debt (e.g., credit card, personal loan)	Pur- pose/ho w used	Current balance	Monthly payment

17. Appraisals and statements of net worth:

Have you prepared a loan application, life insurance application, statement identifying your assets and liabilities, or other statement of a similar nature in the past three years? If so, please provide a copy.

18. Has any third party prepared a valuation or appraisal of an asset, such as a business, real estate, or nonmarketable securities, in which you have an interest? If so, please provide a copy.