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**NEW CLIENT INFORMATION SHEET**

**Are you seeking an attorney or a mediator?**

Your name:

Your spouse's name:

Your children - their names and birthdates:

Date of your marriage:

Your mailing address:

Your phone number:

Your age:

Your spouse's age:

Describe your work:

Your gross income last year:

Your bonuses, if any:

Who provides medical benefits for the family?

Describe your spouse's work:

Your spouse's gross income last year:

Are you and your spouse living separately? Since when?

Your spouse's address, if different from yours:

Describe your current pattern of sharing time with the children:

Are there any special issues regarding your children (health, education, etc.)

## FAMILY ASSETS

### Your Home

- Address
- Current market value
- Is this your estimate of the home's value? An appraisal? A tax assessment?
- Balance owed on your first mortgage
- Balance owed on any second mortgage or home equity loan
- Is the deed in both spouses' names?
- Was the home purchased before the marriage?

### Other real property

### Your retirement savings or benefits

- Pension (guarantee of income upon retirement)
- 401(k), 403(b) or similar retirement accounts
- IRA accounts
- Other
- Were your retirement savings or benefits earned during your marriage, or were some benefits earned before your marriage?

Your spouse's retirement savings or benefits (provide the same information requested re: your benefits)

### Business Ownership

- Do you or your spouse own a business or an interest in a business?
- Type of business
- Do you or your spouse work in the business?
- How much income was reported on last year's business tax return?

Employment benefits (employee stock programs, incentive pay programs, etc)

Securities accounts (location, balance, and whether held jointly or in one spouse's name only)

Savings accounts (Location, Balance, and whether joint or in one spouse's name only)

529 Plans or other Savings for Children

Cars (Make Model and Year, Leased or Owned, Value and Loan Balance)

Other Personal Property (boats, vehicles, collections, etc)

## **FAMILY DEBTS**

Mortgage (name of lender and amount due)

Home equity loan (name of lender and amount due)

Personal loans (from family or friends) or Student loans

Car loans

Loans against retirement savings

Credit card debt (Name of card, balance owed, and whether card is in both names or in one spouse's name only)

Was any of the debt incurred before the marriage?