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MARITAL/PRENUPTIAL AGREEMENT QUESTIONNAIRE

This questionnaire is for informational purposes only and will be kept strictly confidential. If you choose not to use our services, it will not be disseminated to anyone else, except at your request. Please provide the requested information to the best of your ability. If you are not able to obtain all the requested information, complete as much as you have knowledge of. If you obtain additional information after submitting this questionnaire, please keep your attorney informed. If additional space is required, please attach.

***Note:** If an area of the questionnaire does not apply to you, please write-in N/A to mark the answer as not applicable.

Factual Data

TODAY'S DATE: _____ DATE OF MARRIAGE: _____

YOUR NAME: _____

ADDRESS: _____

TELEPHONE NO: _____ CELL PHONE _____

EMAIL ADDRESS _____

DATE OF BIRTH: _____ PLACE OF BIRTH: _____

SOCIAL SECURITY NUMBER: _____

EMPLOYMENT: _____

EMPLOYMENT

ADDRESS: _____

Prior Marriages? Yes _____ No _____ How many? _____

If yes, to whom (next prior if multiple): _____

If yes, when and how terminated: _____

List any children, with names and birth dates:

Names

Birth Dates

FIANCÉE(S) NAME: _____

FIANCÉE(S) ADDRESS: _____

TELEPHONE NO: _____ CELL PHONE NO: _____

EMAIL ADDRESS: _____

DATE OF BIRTH: _____ PLACE OF BIRTH: _____

SOCIAL SECURITY NUMBER: _____

EMPLOYMENT: _____

EMPLOYMENT ADDRESS: _____

Prior Marriages? Yes _____ No _____ How many? _____

If yes, to whom (next prior if multiple): _____

If yes, when and how terminated: _____

List any children, with names and birth dates:

Names

Birth Dates

Has your intended spouse conferred any benefits on you, monetarily or in kind?

If yes, please set forth details of the circumstances:

General Information

1. Do you currently live together? If so, for how long? If not, when do you contemplate living together?

2. Do you currently own any property together?

YES or NO

3. Do you anticipate completing any post-secondary education while you are married?

4. Do either of you own a business?

YES or NO: If yes, briefly describe business: _____

5. Do either of you have trusts, wills, powers of attorney, living wills, and/or other estate planning instruments?

6. Do either of you anticipate inheritance? _____

7. Are either of you involved in litigation where you may receive a judgment or have a judgment entered against you?

8. Do either of you have ex-husbands or wives? _____

9. Do either of you have children? _____

10. Do you anticipate having children together? _____

11. Do you anticipate any major changes in life style, income or net worth within the next two years?

12. What are you most interested in having the prenuptial agreement accomplish?

Property

Property can be real property such as houses, land or time shares; personal property such as vehicles, art, or furnishings; cash; bonds; stocks; stock options; pension funds; IRAs; life insurance; ownership in businesses or partnerships; rights in trusts; options to buy; promissory notes; secured and unsecured loans made by you.

Separate Property

1. What property to you wish to keep separate? _____

2. Do you also wish to keep increases in the value of that property separate, or do you wish to share some portion of it?

Joint Property/ Tenant in Common Property

3. What property to you wish to share? In what proportions? _____

Earnings

4. Will earnings be kept separate, or do you wish to share some portion or all of it?

5. Will you share a joint checking account? Joint savings? Will you retain some separate accounts?

6. Will both people be helping to promote one business? If so, will both people receive a salary or an ownership interest in the business?

Gifts

7. Do you wish gifts given to you individually or as a couple to be shared? Do you wish to share each gift, or have each person assume ownership of some portion of the gifts?

Personal Property Purchased Together

8. Do you wish to jointly own those things purchased together? If not, how will you tell which things are to be jointly owned or separately owned?

Residence

1. Will you be buying a home together? _____

2. Who is/will be on the title of the home? _____

3. If only one person owns the home, will the other person help with expenses such as mortgage, insurance, upkeep? Will they be compensated? In what proportions?

4. Will each person share in any increase of value of an owned home during the time you are together? _____

Expenses

1. Will you share a bank account? _____

2. Will you keep separate bank accounts? _____

3. Will each person help with living expenses? _____

4. In what proportions? _____

5. What if someone cannot pay expenses for a time? _____

6. Will you deem any money given to the other person without a loan agreement a gift?

Debt

1. Will you be loaning money to each other? _____

2. Will you have joint credit cards? _____

3. Will you have separate credit cards? _____

4. Will you both sign on the mortgage, rental agreement, car payments or other major debts?

5. Will one person help to pay off the other person's pre-existing debt?

6. Do either of you have any money owed to you?

7. Do you wish to share the obligation for all joint debt? For all debt incurred during the marriage?

Or only for debt in your name?

Children

1. If you anticipate having children together, have you talked about the number of children?

2. Who would be the primary caretaker for the children? _____

3. Would the primary caretaker stay home with the children in lieu of working for any amount of time? If so, how long? _____

4. If a parent were to stay home with the child(ren) for some amount of time, what would be the expectations of the other spouse regarding financial responsibility of the stay at home parent?

5. Would the child(ren) go to day care? _____

6. What would be the role of extended family members in the child(ren)s lives?

7. Would you want to start saving for a post-secondary education for the children?

8. In case of a conflict between the two of you, who would make the final decision regarding the child's religion? Health care? Medical needs? Mental health needs? Education?

Expectations

1. Do you anticipate retiring together? _____

2. Do you expect the relationship to be monogamous? _____

3. What things are intolerable to you from the other person? _____

4. What sorts of things would cause a break up? _____

5. Do both of you expect to be wage earners for the duration of the partnership? What happens if someone is not? _____

6. Are there any things you believe your partner should not spend money on unless you have agreed first? _____

Death

1. Do either of you have life insurance? Who is the beneficiary? _____

2. Do either of you have retirement benefits? What kind? _____

3. Do you wish your future spouse to inherit any of your property should you die before him or her? _____

4. Do you wish your future spouse to specifically not inherit any or all property? _____

5. Do you have an estate plan completed? If no, would you be interested in our firm preparing one for you?

Dissolution of the Relationship

1. If you were to divorce, would you like to have your agreement cover maintenance to one spouse? _____

2. Would you agree to mediate all divorce issues before going to court? _____

3. Would you agree to have an arbitrator make decisions in the event you and your partner are unable to reach a resolution on certain issues? _____

Other

Are there other issues not covered above that you would like your agreement to address?

2. Checking Accounts

Bank

Account No.

Balance

3. Savings Accounts

Bank

Account No.

Balance

4. Certificates of Deposit, Treasury Bills, Money Market Funds, etc.

Investment

Account No.

Balance

5. Notes/Accounts Receivable

Payee

Amount

Due

6. Marketable Securities

<u>Holding</u>	<u>Value</u>

7. Stock Options

<u>Holding</u>	<u>No. of Shares</u>	<u>When Vested</u>	<u>Price</u>

8. Business Interests (including S Corporation, LLC, LLP)

<u>Description</u>	<u>Value</u>	<u>Nature of Interest</u>

9. Insurance (Life, Homeowners, Health, Disability)

<u>Company</u>	<u>Type</u>	<u>Policy No.</u>	<u>Amount of Coverage/Value</u>	<u>Beneficiary</u>

10. Automobiles, Boats, Planes

<u>Year/Make</u>	<u>Model</u>	<u>Purchase Price</u>	<u>Value</u>	<u>Outstanding Loan</u>

11. Personal Property (Antiques, Jewelry, Furnishings)

<u>Description</u>	<u>Value</u>	<u>Location</u>

12. Retirement Plan/IRA, etc. - Please give details

13. Trust Information

<u>Name of Trust</u>	<u>Type of Interest</u>	<u>Value</u>	<u>Yearly Income Received</u>

B. EXPECTANCIES

Please list any potential inheritances or gifts you anticipate receiving in the future:

<u>Benefactor</u>	<u>Expected Benefit</u>

C. LIABILITIES

1. Credit Cards/Charge Cards

<u>Company</u>	<u>Account No.</u>	<u>Present Balance</u>

2. Mortgages and Auto Loans

<u>Lender</u>	<u>Current Balance</u>	<u>Int. Rate</u>	<u>Date of Loan</u>

3. Promissory Notes

<u>Owed To</u>	<u>Date of Note</u>	<u>Balance</u>	<u>Collateral, If Secured</u>	<u>Due</u>

4. Insurance Policy Loans

<u>Company</u>	<u>Date</u>	<u>Amount</u>	<u>Current Balance</u>	<u>Due</u>
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5. All Other Debts

<u>Owed To</u>	<u>Date Incurred</u>	<u>Amount</u>	<u>Current Balance</u>	<u>Due</u>
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