

CONFIDENTIAL PROPERTY QUESTIONNAIRE

Please fill out this questionnaire and return it as soon as possible. It is important that you answer each question fully.

The information in this form will be used by your attorney in dividing the marital estate, but only after consultation and agreement from you. It is important that you include all property and debts that you are aware of or that you suspect exist. This form attempts to list common categories of property owned by most people. If any type of property that you own is not included please be sure to list it. If you are unsure about anything, list it. Once this form is completed, there will be a follow up meeting to clarify any questions you may have.

ATTORNEY/CLIENT PRIVILEGE ASSERTED AS TO ALL INFORMATION CONTAINED HEREIN

1. Please complete the following concerning your employment.

- a. Employer: _____
- b. Length of employment: _____
- c. Job Title: _____
- d. Street Address: _____
- e. City, State, Zip: _____
- f. Telephone number: _____
- g. Gross salary per month or annually: \$ _____ (per _____)
- h. Do you have a profit sharing plan, stock purchase plan, or expense account through your employment? If so, please describe: _____

IMPORTANT: Please provide your last 3 paycheck stubs, most recent W-2 and tax return.

2. Describe your education (schools attended, dates attended, degrees obtained):

3. Please complete the following concerning your spouse's employment.

- a. Employer: _____
- b. Length of employment: _____
- c. Job Title: _____
- d. Street Address: _____
- e. City, State, Zip: _____

f. Telephone number: _____

g. Gross salary per month or annually: \$ _____ (per _____)

h. Does your spouse have a profit sharing plan, stock purchase plan, or expense account through their employment? If so, please describe: _____

4. Describe your spouse's education (schools attended, dates attended, degrees obtained):

SUMMARY OF PROPERTY (Please provide any deeds, titles, appraisals, statements of account or other documents in your possession regarding your property, also attach any additional sheets as necessary)

Real Estate: (Include family homes, vacation properties, rental properties, land and time share)

1. Address: _____

Mortgage company: _____

Estimated fair market value: \$ _____

Date purchased: _____

Current mortgage balance: \$ _____

Monthly payments: \$ _____

Legal description of the property:

2. Address: _____

Mortgage company: _____

Estimated fair market value: \$ _____

Date purchased: _____

Current mortgage balance: \$ _____

Monthly payments: \$ _____

Legal description of the property:

3. Address: _____

Mortgage company: _____

Estimated fair market value: \$ _____

Date purchased: _____

Current mortgage balance: \$ _____

Monthly payments: \$ _____

Legal description of the property:

Motor Vehicles, Boats, Airplanes, Cycles, Trailers:

1. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

2. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

3. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

4. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

5. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

6. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

7. Year: _____ Make: _____ Model: _____
Who drives? _____ Vehicle Identification No. _____
Mortgage with: _____ Account No. _____
Amount owed: \$ _____ Payment amount: \$ _____
Present market value: \$ _____ How determined? _____

Bank Accounts, Savings Accounts, CD's, Credit Union, Savings Bonds:

1. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

2. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

3. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

4. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

5. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

6. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

7. Name of Institution: _____
Type of account (bank, savings, etc): _____
Account Name: _____ Account No. _____
Amount currently in account \$ _____
Names on account _____

Life Insurance:

1. Name of company: _____

Insuring Life of: _____

Type of policy (term, whole life, etc.): _____ Cash value: \$ _____

2. Name of company: _____

Insuring Life of: _____

Type of policy (term, whole life, etc.): _____ Cash value: \$ _____

3. Name of company: _____

Insuring Life of: _____

Type of policy (term, whole life, etc.): _____ Cash value: \$ _____

Stocks, Mutual Funds, Bonds, Securities:

1. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

2. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

3. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

4. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

5. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

6. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

7. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

8. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

9. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

10. Name of investment: _____

Number of shares owned: _____ Present value: \$ _____

Retirement, Pensions, Other Company Benefits:

1. Do you participate in any retirement plan? _____
Name of the plan: _____
Address of plan: _____
Account No.: _____ Beneficiary: _____
Current value of retirement account: \$ _____
Is any portion of the plan your separate property? _____ Date plan started: _____

2. Does your spouse participate in any retirement plan? _____
Name of the plan: _____
Address of plan: _____
Account No.: _____ Beneficiary: _____
Current value of retirement account: \$ _____
Is any portion of the plan their separate property? _____ Date plan started: _____

Other:

1. Does anyone owe you or your spouse any money? _____
If so, how much \$ _____
Owed by whom? _____

2. Are you or your spouse involved in any lawsuits? _____
If so, describe: _____

3. Do you own any livestock or mineral interests? _____
If so, describe: _____

4. Do you belong to any clubs with an equity interest? _____
If so, describe: _____

Debts: (Other than house and/or vehicles. For example, credit card debt or personal loans)

1. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

2. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

3. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

4. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

5. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

6. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

7. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

8. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

9. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

10. Name of creditor: _____
Account No. _____ Amount owed: \$ _____ Min. payment: \$ _____

Income Tax:

Have you filed for all previous years? _____ Joint or separate? _____
Prepared by whom? _____
Refund received/expected? _____ If so, how much? \$ _____

Separate Property:

Do you own any separate property (owned before marriage or received during marriage by gift or inheritance)? If so, detail your separate property:

1. Description: _____
a. How acquired? _____ b. Date acquired? _____

2. Description: _____
a. How acquired? _____ b. Date acquired? _____

3. Description: _____
a. How acquired? _____ b. Date acquired? _____

Does your spouse own any separate property? If so, detail the separate property:

1. Description: _____
a. How acquired? _____ b. Date acquired? _____

2. Description: _____
a. How acquired? _____ b. Date acquired? _____

3. Description: _____
a. How acquired? _____ b. Date acquired? _____

Furniture and Household Items:

On a separate sheet of paper, please:

1. List all furniture and household items, room by room, located in each home or property you own
2. List all pieces of jewelry, artwork, or collections owned by either you or your spouse
3. For each item, please list both the purchase price (if known) **and** the price the item would be worth if sold today
4. If the item is an antique please provide a photo, if possible, and the basis for your answer to question 3
5. If any items were acquired by either a gift or inherited please note that as well