

PREMARITAL INTAKE FORM

TODAY'S DATE: _____ EXPECTED DATE OF MARRIAGE: _____

Please answer the following with regard to you and your intended spouse:

1. **BASIC FACTUAL DATA**

YOUR NAME: _____

ADDRESS: _____

TELEPHONE NO: _____ E-MAIL: _____

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:

<u>Name</u>	<u>Birth Dates</u>
_____	_____
_____	_____
_____	_____
_____	_____

INTENDED'S NAME: _____

ADDRESS: _____

TELEPHONE NO: _____

DATE OF BIRTH: _____ PLACE OF BIRTH: _____

EMPLOYMENT: _____

SOCIAL SECURITY NUMBER: _____

Prior Marriages? If yes, to whom: _____

If yes, when and how terminated: _____

List any children,- with names and birth dates:

Name

Birth Dates

<u>Name</u>	<u>Birth Dates</u>

Have you lived with your intended? _____

If yes, please indicate:

Length of time: _____

Circumstances (own, rent, jointly held, etc.) _____

Has your intended spouse made any contributions to you, economically, by way of providing funding or labor? _____

If yes, please set forth details of the circumstances: _____

II. **PURPOSE OF AGREEMENT**

A. Segregate present property, gifts and inheritance in the event of death.

Yes _____ No _____

B. Segregate present property, gifts and inheritance in the event of divorce.

Yes _____ No _____

C. Permit all assets during the marriage to be segregated in the event of divorce.

Yes _____ No _____

Provide:

1. Alimony Yes _____ No _____

2. Division of Assets Yes _____ No _____

3. Child Support Yes _____ No _____

4. Responsibilities during marriage Yes _____ No _____

III. **ASSETS PRESENTLY HELD AND ANTICIPATED**

Please list, in detail, with present fair market values, ail of your assets. Below is a list of separate categories to assist you:

A. **ASSETS**

1. Real Estate. Condominiums. Time Sharing Interests. Vacation Homes

<u>Location</u>	<u>Type</u>	<u>Purchase Price</u>	<u>Purchase Price</u>	<u>Value</u>	<u>Mortgage</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

2. Checking Accounts

<u>Bank</u>	<u>Account No.</u>	<u>Balance</u>

3. Savings Accounts

<u>Bank</u>	<u>Account No.</u>	<u>Balance</u>

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

<u>Investment</u>	<u>Account No.</u>	<u>Balance</u>

5. Notes/Accounts Receivable

<u>Payee</u>	<u>Account No.</u>	<u>Due</u>

6. Marketable Securities

<u>Holding</u>	<u>No. of Shares</u>	<u>Trade Price</u>
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7. Stock Options

<u>Holding</u>	<u>No. of Shares</u>	<u>When Vested</u>	<u>Price</u>
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8. Business Interests (including S Corporations, LLC, LLP)

<u>Description</u>	<u>Values</u>	<u>Nature of Interest</u>
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9. Insurance (Life, Homeowners, Health)

<u>Company</u>	<u>Type</u>	<u>Policy No.</u>	<u>Amount of Coverage/Value</u>	<u>If any Beneficiary</u>
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10. Automobiles. Boats

<u>Year/Make</u>	<u>Model</u>	<u>Purchase Price</u>	<u>Value</u>	<u>Outstanding Loan</u>
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11. Personal Property (Antiques, Jewelry, Furnishings)

<u>Description</u>	<u>Value</u>	<u>Location</u>
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12. Pension 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>
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B. POTENTIAL INHERITANCES

Please list here any potential inheritances you anticipate receiving in the future, as follows:

<u>Benefactor</u>	<u>Anticipated Inheritance</u>
_____	_____
_____	_____
_____	_____

C. LIABILITIES

1. Credit Cards/Charge Cards

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

2. Mortgages

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

3. Notes

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

4. Insurance Policy Loan

<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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