

Client Name: _____

FAMILY LAW PROPERTY INFORMATION QUESTIONNAIRE

List all your known community and separate assets or debts. Include all assets, even those previously divided between you and your spouse, and those in another party's possession.

Generally, separate property is property you or your spouse owned before your marriage, purchased after you separated, or items received as gifts or inheritance. If you believe that an item is separate property so indicate in the columns entitled "SP" by entering an "H" if the property or debt belongs to the husband or a "W" if the property or debt belongs to the wife.

List the fair market value of all items in the column entitled "FMV". All values you list should be as of the date that you sign this declaration, unless you specify a different valuation date and so indicate. Values should be market value, garage sale prices, or what you believe the item would sell for, not what you paid for the item. For additional space use a continuation sheet numbered to show what item is being continued.

PROPERTY



1. REAL ESTATE

List below each parcel of real estate that you own.

a. Street Address: _____

City: _____ State: _____ Zip: _____

Current Market Value: \$ _____ Purchase Price: \$ _____

1st Mortgage Balance: \$ _____ 2nd Mortgage Balance: \$ _____

Date purchased: _____ Net Value: \$ _____

Does any party claim to have a separate property interest?

Husband Wife Other

Who is in possession? Husband Wife Other

Please attach:

Copy of deed:

Latest Lender's Statement:

Attached

Attached

Not attached because:

Not attached because:



3. JEWELRY, ANTIQUES, ART, COIN COLLECTIONS, or VALUABLE ITEMS



List all items of particular value. If you believe an item is separate property so indicate in the column entitled "SP" by entering an "H" if the property belongs to the Husband or "W" if the property belongs to the Wife. In the column headed "Award to" indicate who you believe should receive the item in the property settlement.

| Item | Who Has It Now? | SP | Year Acquired | Award to | Resale Value | Amount Owed | Owed to |
|------|-----------------|----|---------------|----------|--------------|-------------|---------|
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Attach additional pages to list any additional household furniture and furnishings.

_____ additional pages attached



4. VEHICLES, BOATS, TRAILERS



a. Describe: Year, Make, Model: _____

Describe any special accessories: _____

Condition: Excellent Good Fair Poor

Separate property: Husband Wife Other

Who has possession?: Husband Wife Other

Who should get the item in the property settlement?: Husband Wife

Current Fair Market Value: \$ _____ Date Acquired: _____

(Note: you can go to www.KBB.com and drill down to file the car's value.)

Amount owed: \$ _____ To whom? _____

Copy of title documents:

Attached

Attached

Not attached because:

Not attached because:

6. CHECKING ACCOUNTS

| Names on Account | Account Number | Bank | Branch | S P | Balance | Date Opened |
|-------------------------|-----------------------|-------------|---------------|----------------|----------------|------------------------|
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Attach copy of latest statement for each account

Attached

Not attached because: _____

7. CREDIT UNION AND OTHER DEPOSIT ACCOUNTS

| Names on Account | Account Number | Bank | Branch | S P | Balance | Date Opened |
|-------------------------|-----------------------|-------------|---------------|----------------|----------------|------------------------|
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Attach copy of latest statement for each account

Attached

Not attached because: _____

8. **CASH**

State amount and location: _____



9. **TAX REFUNDS**

Amount presently due: _____

10. **LIFE INSURANCE WITH CASH SURRENDER OR LOAN VALUE**

List all current life insurance. If the insurance is either party’s separate property, indicate “W” for Wife or “H” for Husband in the column titled “SP.”

| Insured and Face Amount | Policy Number | Insurance Company | Date Acquired | S P | Market Value | Debt |
|-------------------------|---------------|-------------------|---------------|-----|--------------|------|
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Attach copy of declaration page for each policy

Attached

Not attached because: _____

11. **STOCKS, BONDS, SECURED NOTES AND MUTUAL FUNDS**

If the item is either party’s separate property, indicate “W” for Wife or “H” for Husband in the column titled “SP.”

| Item | Certificate Numbers | Broker | Date Acquired | S P | Market Value | Debt |
|------|---------------------|--------|---------------|-----|--------------|------|
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| Item | Certificate Numbers | Broker | Date Acquired | S P | Market Value | Debt |
|------|---------------------|--------|---------------|--------|--------------|------|
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If held in certificate form, attach copy of each certificate.

If held in an account, attach latest statement for each account

Attached

Not attached because: _____

12. RETIREMENT AND PENSIONS

Attach copies of latest plan documents.

Plan Documents: Attached None

Benefit Statement: Attached None



Wife's Plan's Name: _____

Plan Administrator: _____

Address: _____

Husband's Plan's Name: _____

Plan Administrator: _____

Address: _____

13. **PROFIT SHARING, ANNUITIES, IRAS, DEFERRED COMPENSATION**

Attach copies of latest plan documents.

Plan Documents: Attached None

Benefit Statement: Attached None

Wife's Plan's Name: _____

Plan Administrator: _____

Address: _____

Husband's Plan's Name: _____

Plan Administrator: _____

Address: _____

14. **MONEY OWED TO YOU** (Notes, Accounts Receivable, Oral Agreements, IOU's)

Attach documents detailing each debt owed to you. If separate property so indicate.

None

Information attached: _____

15. **PARTNERSHIPS AND OTHER BUSINESS INTERESTS**

Business Name: _____

Business Accountant Name/Address: _____

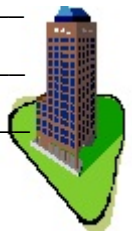
Type of Business: Corporation Partnership

Limited Liability Company Sole Proprietorship

Have any business loan applications been made in the last 12 months? Yes No

Have any business appraisals been made in the last 12 months? Yes No

Number of Employees: _____ Key Employee Names: _____



Attach copies of the last profit and loss statements:

Attached

Not attached because: _____

16. OTHER ASSETS

List any other assets which have not been disclosed above. Identify the asset, the date acquired, if it is separate property, what it is worth and if there is any debt against the asset.



Trusts

Patents



Stock options

Options to purchase property

Legacies

Pending personal injury cases

Oil/gas royalties

Worker's compensation cases

Mineral rights

"Secret" partnerships

Copyrights

None

Information attached: _____

OTHER RELEVANT TRANSACTIONS AND CLAIMS

1. GIFTS

List any gifts you have made without your spouse's consent in the past 24 months, their value, and the recipients.

None The following gifts were made without consent:

2. **CREDITS**



Do you claim reimbursement or credits for payments of community debts since the date of separation? If your answer is yes, identify the source of payment, the creditor, the date paid, and the amount paid. State whether you have added to the debt since the separation.

- None The following reimbursements are claimed:

3. **INSURANCE**

Identify each type of insurance you have:

Health: _____ Agent/Agency: _____

Automobile: _____ Agent/Agency: _____

Disability: _____ Agent/Agency: _____

Have you investigated whether COBRA insurance is available to you? Yes No

Attach a copy of the face sheet of certificate of each policy.

Attached

Not attached because: _____

4. **HEALTH**

Is there any physical or emotional condition that limits your ability to work?

If your answer is yes, please explain.

None The following limitations: _____

Are you or your spouse receiving disability, workers compensation or SSI payments? If your answer is yes, please explain your answer.

None The following payments: Disability Worker's Comp SSI

Explanation: _____

5. **CHILDREN'S NEEDS**

Do you contend that your children have any special needs? If so identify the child with the need, reason for the need, cost, and expected duration.



Not applicable The following are the special needs: _____

6. **PROPERTY VALUATIONS**

Have you had appraisal discussions or offers to purchase during the past 12 months on any of the assets listed on your completed schedule of assets and debts? If your answer is yes, identify the discussions and attach any appraisal documents.

None The following: _____

Appraisal attached

7. **PROPERTY HELD BY OTHERS**

Is there any property in the possession of any third party in which you have any interest or over which you have any control? If your answer is yes, indicate whether the property is listed on this form. If not, describe and identify each such asset, state its present value and the basis for your valuation, and identify the person holding the asset.

None The following: _____

8. **CLAIMS OF REIMBURSEMENT**

Do you have the right to be reimbursed for any expenditures of your separate property on community assets or debts? If yes, then please explain.

No Yes (Explain): _____

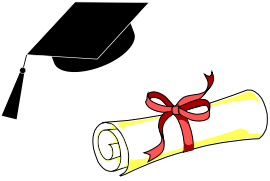
Have you spent any separate property money on your spouse's debts since separation? If yes, then please explain.

No Yes (Explain): _____

DEBTS

1. STUDENT LOANS

Give details of who is owed, when the debt was incurred, the current balance and payments made during the marriage on the debt. Attach a copy of any loan documents.



None The following: _____

2. TAXES

If any back taxes are currently owed, state the taxing authority which is owed, the amount due, the period of time the tax was for, and attach copies of the tax bill. Indicate if this is a separate debt, present balance and date incurred.

None The following: _____

3. SUPPORT ARREARAGES

Give details of the amount due, and attach a copy of the support order and recent statements. Indicate if this is a separate debt, present balance and date incurred.

None The following: _____

4. UNSECURED LOANS YOU OWE

State creditor's name and address, the account number, the current balance and a copy of the note and recent statement. Indicate if this is a separate debt, present balance and date incurred.

None The following: _____

| Creditor and Address | Sep Debt | Date Incurred | Total Owed | Loan Purpose |
|----------------------|----------|---------------|------------|--------------|
| | | | | |
| | | | | |

Attach a copy of the latest statement for each credit card.

- Attached
- Not attached because: _____

6. OTHER DEBTS

Identify any other debts and indicate if this is a separate debt, present balance and date incurred. Attach any documentation that backs up the debt and the most recent statement.

- None
- The following: _____

7. OTHER

Please give us the details of any other financial transactions, assets or debts not detailed above.
