

THE WEALTH COUNSELOR LLC

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PRE-NUPTIAL INFORMATION FORM

WHEN YOU HAVE COMPLETED THIS FORM, please return it to our office. We rely upon the information you provide us to be accurate and complete in all respects. If the information is not accurate and complete, the recommendations we make may not be appropriate for your situation.

1. Client:

Name _____ Date of Birth: _____

Address _____

Social Security No.: _____ US Citizen? Yes _____ No _____

Future Spouse:

Name: _____ Date of Birth: _____

Social Security No.: _____ US Citizen? Yes _____ No _____

Street Address _____ Apt _____ County _____

City _____ State _____ Zip _____

Telephone Number: H: _____ W/Client _____ W/Spouse _____

State of Residence _____

We strongly recommend that your prospective spouse have separate counsel in order to strengthen the effectiveness of the prenuptial agreement. If your prospective spouse will retain counsel, please furnish such counsel's name, address and telephone number.

Name: _____

Address: _____

City, State, ZIP: _____

Telephone: (____)_____

2. Marriage

When will you be married to each other? _____

Have you or your future spouse been divorced? Yes _____ No _____

If so, please send a copy of divorce decree w/questionnaire.

3. Children

Please list ALL your children, including deceased children, adopted children, children from a prior marriage, if any, which may be affected by this marriage:

<u>Name of Child</u>	<u>Date of Birth</u>	<u>Address</u>	<u>Child of</u>
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4. Financial Inventory

List approximate values under each person showing ownership of each asset. ATTACH SUPPORTING DATE FOR EACH ASSET, i.e. bank statements, retirement reports, stock and bond account reports, copies of deeds to real estate etc.:

ASSETS	CLIENT	FUTURE SPOUSE	JOINT
Home			
Other Real Estate			
Checking Account			
Savings Account			
Money Market Account			
Automobile			
Personal Property			
Stocks & Bonds			
Closely Held Business Interests			
TOTAL ASSETS:			

Life Insurance (Face):
On Client's life
On Future Spouse's life
Retirement Accounts:
IRA
Pension
Profit Sharing/401K
Other Assets:
TOTALS:

LIABILITIES	CLIENT	FUTURE SPOUSE	JOINT
Home Mortgage			
Other Mortgages			
Debts To Family Members			
Other Debts (describe):			
TOTAL LIABILITIES:			

5. Beneficiary Designations:

a. Life Insurance:

Policy Name/No. Beneficiary	Face Value	Owner	Insured
1.			
2.			
3.			
4.			

b. Retirement Plans. Please list your retirement plans/IRS's; value of each and the beneficiary of each.

6. Personal Property

Describe and give a value of any items of substantial value, such as automobiles, works of art, jewelry, etc. Be sure to include any items listed on an insurance rider.

Description

Approximate Value

Personal Property

Automobiles

Collectibles

Jewelry

Boats/Airplanes

Other:

7. Safe Deposit Box

Do you have a safe deposit box? Yes _____ No _____ If so, Where? _____

Does anyone else have access to your box? _____

8. Financial Advisors:

Accountant:

Address:

Telephone:

Financial Advisor:

Address:

Telephone:

Additional General Information

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

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

3. Do either of you own a business?

YES or NO

4. Do either of you have wills, powers of attorney, living wills, and/or documents that set forth medical and funeral wishes? _____

5. Do either of you anticipate inheritance? _____

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

7. Do you anticipate having children together? _____

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

9. Why are you most interested in having the prenuptial agreement accomplished?

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 do 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

3. What property do 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 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 and Sanctions

1. Do you expect to have children?_____

2. Do you anticipate retiring together?_____

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

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

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

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

7. 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 encompass? _____

