

# BROWN, TARLOW, BRIDGES, PALMER & STONE, P.C.

## DISSOLUTION CLIENT INFORMATION SHEET

(Please answer all questions on all pages)

Husband's Name: \_\_\_\_\_

(Father's name, if unmarried)

Address: \_\_\_\_\_

Employer's Name: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

Phone: (home) \_\_\_\_\_ (work) \_\_\_\_\_

Birthdate: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Race: \_\_\_\_\_ Social Security # \_\_\_\_\_

Driver's License # \_\_\_\_\_

Education: (# of years) \_\_\_\_\_ Number of Marriage: \_\_\_\_\_

If previously married, last marriage ended (specify, by death,  
divorce, dissolution, annulment) \_\_\_\_\_

Date Last Marriage Ended \_\_\_\_\_

Wife's name: \_\_\_\_\_

(Mother's name, if unmarried)

Maiden Surname: \_\_\_\_\_ Name Restored? \_\_\_\_ Yes \_\_\_\_ No

Former Married Names: \_\_\_\_\_

Address: \_\_\_\_\_

Employer's Name: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

Phone: (home) \_\_\_\_\_ (work) \_\_\_\_\_

Birthdate: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Race: \_\_\_\_\_ Social Security # \_\_\_\_\_

Driver's License # \_\_\_\_\_

Education: (# of years) \_\_\_\_\_ Number of Marriage: \_\_\_\_\_

If previously married, last marriage ended (specify, by death, divorce, dissolution, annulment) \_\_\_\_\_

Date Last Marriage Ended \_\_\_\_\_

Date and Place of this Marriage: \_\_\_\_\_

Date and Place of Separation for this Marriage: \_\_\_\_\_

| Children of the Marriage: | Birthdate | Sex   | SS#   |
|---------------------------|-----------|-------|-------|
| _____                     | _____     | _____ | _____ |
| _____                     | _____     | _____ | _____ |
| _____                     | _____     | _____ | _____ |

Real Property at Issue Yes \_\_\_ No \_\_\_  
If yes, please provide description of property:

**If child(ren) involved, please list addresses for where the child(ren) has lived for the last five years and with whom.**

| <u>Dates</u> | <u>Addresses</u> | <u>Lived with Whom</u><br>(Self, other party, grandparent) |
|--------------|------------------|--|
| _____        | _____            | _____  |
| _____        | _____            | _____  |
| _____        | _____            | _____  |
| _____        | _____            | _____  |
| _____        | _____            | _____  |

Husband/Father's Gross Monthly Income \$ \_\_\_\_\_

Wife/Mother's Gross Monthly Income \$ \_\_\_\_\_

Monthly Childcare Costs? \$ \_\_\_\_\_

Monthly Cost of Insurance for Child Only? \$ \_\_\_\_\_

# 1. ASSETS

A. **REAL ESTATE** (Include all interests in real estate-land contracts, options, life tenancies, leases other than homestead, cemetery lots, etc.)

| Type/Address | Present Owner | Adjusted Cost Basis | Type of Valuation | Date of Valuation | Value |
|--------------|---------------|---------------------|-------------------|-------------------|-------|
| _____        | _____         | _____               | _____             | _____             | _____ |
| _____        | _____         | _____               | _____             | _____             | _____ |
| _____        | _____         | _____               | _____             | _____             | _____ |
| _____        | _____         | _____               | _____             | _____             | _____ |

# B. HOUSEHOLD ITEMS AND PERSONAL EFFECTS

|                                     | Present Owner | Type of Valuation | Date of Valuation | Value |
|-------------------------------------|---------------|-------------------|-------------------|-------|
| Furnishings (h)                     | _____         | _____             | _____             | _____ |
| Furnishings (w)                     | _____         | _____             | _____             | _____ |
| Personal effects (h)                | _____         | _____             | _____             | _____ |
| Personal effects (w)                | _____         | _____             | _____             | _____ |
| Jewelry, silver, crystal, china (h) | _____         | _____             | _____             | _____ |
| Jewelry, silver, crystal, china (w) | _____         | _____             | _____             | _____ |
| Antiq., heirlooms, obj. of art (h)  | _____         | _____             | _____             | _____ |
| Antiq., heirlooms, obj. of art (w)  | _____         | _____             | _____             | _____ |
| Recreation equipment (h)            | _____         | _____             | _____             | _____ |
| Recreation equipment (w)            | _____         | _____             | _____             | _____ |
| Garden and yard equipment           | _____         | _____             | _____             | _____ |
| _____                               | _____         | _____             | _____             | _____ |
| _____                               | _____         | _____             | _____             | _____ |
| _____                               | _____         | _____             | _____             | _____ |

**C. RETIREMENT BENEFITS** (Designate whether vested or unvested. If deferred income taxes were not considered in determining value, list them under "Deferred Liabilities.")

| Type/Address | Present Owner | Adjusted Cost Basis | Type of Valuation | Date of Valuation | Value |
|--------------|---------------|---------------------|-------------------|-------------------|-------|
| _____        | _____         | _____               | _____             | _____             | _____ |
| _____        | _____         | _____               | _____             | _____             | _____ |
| _____        | _____         | _____               | _____             | _____             | _____ |
| _____        | _____         | _____               | _____             | _____             | _____ |

**D. LIFE INSURANCE** (If loans were not considered in determining value, list them under "Liens.")

| Company Name/<br>Policy Number | Present Owner | Insured | Beneficiary Value | Face Valuation | Date of Surrender | Cash Value |
|--------------------------------|---------------|---------|-------------------|----------------|-------------------|------------|
| _____                          | _____         | _____   | _____             | _____          | _____             | _____      |
| _____                          | _____         | _____   | _____             | _____          | _____             | _____      |
| _____                          | _____         | _____   | _____             | _____          | _____             | _____      |
| _____                          | _____         | _____   | _____             | _____          | _____             | _____      |

**E. VEHICLES**

| Year/Make/Model | Present Owner | Type of Valuation | Date of Valuation | Value |
|-----------------|---------------|-------------------|-------------------|-------|
| _____           | _____         | _____             | _____             | _____ |
| _____           | _____         | _____             | _____             | _____ |
| _____           | _____         | _____             | _____             | _____ |
| _____           | _____         | _____             | _____             | _____ |

**F. CASH AND DEPOSIT ACCOUNTS**

| Name of Institution/Account # | Present Owner | Type of Valuation | Date of Valuation | Value |
|-------------------------------|---------------|-------------------|-------------------|-------|
| _____                         | _____         | _____             | _____             | _____ |
| _____                         | _____         | _____             | _____             | _____ |
| _____                         | _____         | _____             | _____             | _____ |
| _____                         | _____         | _____             | _____             | _____ |
| Cash on Hand                  | _____         | _____             | _____             | _____ |

**G. STOCK/BONDS/SECURITIES/RETIREMENT**

| No. of Shares | Company Name/Cert. No. | Present Owner Basis | Adjusted Cost | Type of Valuation | Date of Valuation | Value | Value |
|---------------|------------------------|---------------------|---------------|-------------------|-------------------|-------|-------|
| _____         | _____                  | _____               | _____         | _____             | _____             | _____ | _____ |
| _____         | _____                  | _____               | _____         | _____             | _____             | _____ | _____ |
| _____         | _____                  | _____               | _____         | _____             | _____             | _____ | _____ |
| _____         | _____                  | _____               | _____         | _____             | _____             | _____ | _____ |

**H. BUSINESS AND PROFESSIONAL INTERESTS** (If Liabilities were not considered in determining value, list them under "Other Liabilities.")

|       | Present Owner | Type of Valuation | Date of Valuation | Value |
|-------|---------------|-------------------|-------------------|-------|
| _____ | _____         | _____             | _____             | _____ |
| _____ | _____         | _____             | _____             | _____ |
| _____ | _____         | _____             | _____             | _____ |
| _____ | _____         | _____             | _____             | _____ |

I. **MISCELLANEOUS ASSETS** (Includes coins, stamps, rare books, other collections, guns, machinery, tools, promissory notes, pre-paid expenses, interests in trusts or estates, powers of appointment, contract or mineral rights, judgments, livestock, valuable pets, franchises, patents, copyrights, trademarks, tax refunds, tax shelters, future interests, receivables, causes of action, enhanced earning capacity, or other tangible or intangible property.)

| Description    | Present Owner | Date of Valuation | Value |
|----------------|---------------|-------------------|-------|
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| _____          | _____         | _____             | _____ |
| Total \$ _____ |               |                   |       |

2. **LIABILITIES:**

A. **MORTGAGES AND LIENS** (Secured)

| Creditor's Name | Security/Asset | Person(s) Respons. | Monthly Payment | Date of Balance | Balance  |
|-----------------|----------------|--------------------|-----------------|-----------------|----------|
| _____           | _____          | _____              | _____           | _____           | _____    |
| _____           | _____          | _____              | _____           | _____           | _____    |
| _____           | _____          | _____              | _____           | _____           | _____    |
| _____           | _____          | _____              | _____           | _____           | _____    |
| Total           |                |                    | \$ _____        |                 | \$ _____ |

**B. INSTALLMENT PAYMENTS AND OTHER LIABILITIES (Unsecured)**

| Creditor's Name | Purpose | Person(s)<br>Respons. | Monthly<br>Payment | Date of<br>Balance | Balance  |
|-----------------|---------|-----------------------|--------------------|--------------------|----------|
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| Total           |         |                       | \$ _____           |                    | \$ _____ |

**C. NON-MARITAL LIABILITIES**

| Creditor's Name | Purpose | Person(s)<br>Respons. | Monthly<br>Payment | Date of<br>Balance | Balance  |
|-----------------|---------|-----------------------|--------------------|--------------------|----------|
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| _____           | _____   | _____                 | _____              | _____              | _____    |
| Total           |         |                       | \$ _____           |                    | \$ _____ |

**D. CONTINGENT AND/OR DEFERRED LIABILITIES (Include legal claims, options, contingent income taxes, etc. Indicate if endorser, co-maker, guarantor, or signatory on leases or contracts. Also include all deferred income taxes permitted or required to be recognized by state law with respect to the valuation of any asset, if not previously considered in determining value.)**

| Creditor's Name | Purpose/Nature/Security | Date of<br>Balance | Balance |
|-----------------|-------------------------|--------------------|---------|
| _____           | _____                   | _____              | _____   |
| _____           | _____                   | _____              | _____   |
| _____           | _____                   | _____              | _____   |

**3. OTHER INSURANCE:**

(State name of company, policy number, and other relevant details.)

Health: \_\_\_\_\_

Accident: \_\_\_\_\_

Disability: \_\_\_\_\_

Vehicle: \_\_\_\_\_

Homeowners/Renters: \_\_\_\_\_

Personal Property: \_\_\_\_\_

Personal Liability Umbrella: \_\_\_\_\_

Other: \_\_\_\_\_

**4. INHERITED PROPERTY:**

Did you or your spouse ever acquire any property by bequest, devise or inheritance or pay for property with such funds? \_\_\_ Yes \_\_\_ No. If "yes", provide details below or on a separate schedule.

| Description | Present Owner | Type of Valuation | Date of Valuation | Current Market Value |
|-------------|---------------|-------------------|-------------------|----------------------|
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |

**5. GIFTS:**

Did you or your spouse ever acquire any property by gift or pay for property with such funds? Yes \_\_\_ No \_\_\_\_\_. If "yes", provide details below or on a separate schedule.

| Description | Present Owner | Type of Valuation | Date of Valuation | Current Market Value |
|-------------|---------------|-------------------|-------------------|----------------------|
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |

**6. OTHER PROPERTY NOT SUBJECT TO DIVISION:**

Did you or your spouse ever acquire any other property which you believe should not be divided? \_\_\_ Yes \_\_\_ No. If "yes", provide details below or on a separate schedule.

| Description | Present Owner | Type of Valuation | Date of Valuation | Current Market Value |
|-------------|---------------|-------------------|-------------------|----------------------|
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |

**7. PROPERTY BROUGHT TO MARRIAGE:**

Did you or your spouse bring any property to the marriage? \_\_\_ Yes \_\_\_ No. If "yes", provide details below or on a separate schedule.

| Description | Present Owner | Type of Valuation | Date of Valuation | Current Market Value |
|-------------|---------------|-------------------|-------------------|----------------------|
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |
| _____       | _____         | _____             | _____             | _____                |

8. Have you disposed of any asset with a fair market value of \$500 or more within the one-year period prior to the filing of the Petition for Divorce, the proceeds of which are not accounted for in this Statement? \_\_\_ Yes \_\_\_ No. If "yes", attach details.

9. Are you a party in any other lawsuits? \_\_\_ Yes \_\_\_ No. If "yes", attach details.

10. Have you ever had a tax audit? \_\_\_ Yes \_\_\_ No. If "yes", attach details.

11. Have you ever filed bankruptcy? \_\_\_ Yes \_\_\_ No. If "yes", attach details.

12. Have you ever prepared a Financial Statement? \_\_\_ Yes \_\_\_ No. If "yes", attach details.