

## **CLIENT DATA SHEET: PRENUPTIAL AGREEMENT**

**Return to:**

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**I. MARRIAGE/ PRE-NUPTIAL AGREEMENT**

What is today's date? \_\_\_\_\_

What is the expected date of marriage? \_\_\_\_\_

Where will be marriage take place? \_\_\_\_\_

Have the wedding invitations been sent out? Y or N

What other plans have been made and/or carried out for the wedding?

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Do you feel pressured in any way to enter into a prenuptial agreement? Y or N

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The Prenuptial Agreement is desired by: \_\_\_\_\_

Your **main goals** for the prenuptial agreement are as follows:

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How do **your goals** differ from your fiancé's goals:

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What issues to do you foresee with the negotiation of the prenuptial agreement?

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Does your fiancé have an attorney? Y or N

Contact information:

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What decisions have you already made about your prenuptial agreement?

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**II. PERSONAL CONFIDENTIAL INFORMATION**

**A. Client**

Full Legal Name \_\_\_\_\_

Formally Known As/Also Known As \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email \_\_\_\_\_

Date of Birth \_\_\_\_\_

Social Security Number \_\_\_\_\_

Previous marriages? Y or N

If yes, list terminating event(s) and date(s):

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Employer: \_\_\_\_\_

Position: \_\_\_\_\_

Length of Employment: \_\_\_\_\_ Approx. Annual Gross Pay: \$ \_\_\_\_\_

Education:

<u>Level</u>	<u>Graduated?</u> <u>Y or N</u>	<u>Degree</u>	<u>(Anticipated)</u> <u>Date of</u> <u>Graduation</u>	<u>School/</u> <u>University</u>
High School				
Community College				
Undergraduate School				
Graduate School				
Professional School				
Technical School				
Post Doc				

Executed a Last Will and Testament? Y or N      Date: \_\_\_\_\_

**B. Future Spouse**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

Previous marriages? Y or N

If yes, list terminating event(s) and date(s):

\_\_\_\_\_

Employer: \_\_\_\_\_

Position: \_\_\_\_\_

Length of Employment: \_\_\_\_\_ Approx. Annual Gross Pay: \$ \_\_\_\_\_

Education:

<u>Level</u>	<u>Graduated?</u> <u>Y or N</u>	<u>Degree</u>	<u>(Anticipated)</u> <u>Date of</u> <u>Graduation</u>	<u>School/</u> <u>University</u>
High School				
Community College				
Undergraduate School				
Graduate School				
Professional School				
Technical School				
Post Doc				

Executed a Last Will and Testament? Y or N      Date: \_\_\_\_\_

**C. Children**

**1. Child**

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Father/Mother

Check:  With Future Spouse  Illegitimate  Prior Marriage  Adopted

Check:  Male  Female

## 2. Child

\_\_\_\_\_  
Full Legal Name

\_\_\_\_\_  
Formally Known As/Also Known As

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Email

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Name of Father/Mother

Check:  With Future Spouse  Illegitimate  Prior Marriage  Adopted

Check:  Male  Female

**(Put additional children in an addendum with similar information)**

### III. SOURCES OF INCOME

#### A. Client

<u>Source</u>	<u>Type*</u>	<u>Expected this Calendar Year</u>	<u>Amount Last Calendar Year</u>	<u>Amount 2 Calendar Years Ago</u>	<u>Significant Changes Expected</u>

- \* S = Salary
- P= Pension
- D= Dividends
- I= Interest
- C= Capital Gains
- T-Trust
- R=Rent
- O= Other

**B. Future-Spouse**

<u>Source</u>	<u>Type*</u>	<u>Expected this Calendar Year</u>	<u>Amount Last Calendar Year</u>	<u>Amount 2 Calendar Years Ago</u>	<u>Significant Changes Expected</u>

- \* S = Salary
- P= Pension
- D= Dividends
- I= Interest
- C= Capital Gains
- T-Trust
- R=Rent
- O= Other

**C. ASSETS**

**A. Real Property**

**1. Client**

<u>Type*</u>	<u>Address</u>	<u>Purchase Date</u>	<u>Purchase Price</u>	<u>FMV</u>	<u>Balance on Mortgage</u>	<u>Title Owner(s)</u>




\* R = residence, I= investment/ rental, U = unimproved land, F= farm or ranch, C= commercial property, V = vacation property

**2. Future Spouse**

<u>Type*</u>	<u>Address</u>	<u>Purchase Date</u>	<u>Purchase Price</u>	<u>FMV</u>	<u>Balance on Mortgage</u>	<u>Title Owner(s)</u>

\* R = residence, I= investment/ rental, U = unimproved land, F= farm or ranch, C= commercial property, V = vacation property

**B. Stocks and Bonds**

**1. Stocks**

<u>Stock Name</u>	<u>Certificate No.</u>	<u>Address</u>	<u>Title Owner</u>	<u>Stock Value</u>

## 2. Brokerage Accounts

Brokerage Name	Account No.	Address	Title Owner	Account Value

## 3. Mutual Funds

Fund Name	Account No.	Address	Title Owner	Fund Value

## 4. Dividend Reinvestment Plans

DRIP Name	Account No.	Address	Title Owner	Fund Value

**5. Commodities**

<b>Commodity Name</b>	<b>Account No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Commodity Value</b>

**6. Options**

<b>Option Name</b>	<b>Account No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Option Value</b>

**7. Bonds**

<b>Type of Bond</b>	<b>Bond Issuer Name</b>	<b>Certificate No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Bond Value</b>

**C. Bank Accounts**

<b>Type of Account (Checking, Savings, Money Market)</b>	<b>Bank Name</b>	<b>Account No.</b>	<b>Address</b>	<b>Title Owner</b>	<b>Individual or Joint; In Trust for; Custodian for; Payable on Death to</b>

**D. Life Insurance**

<b>Name of Insurance Co.</b>	<b>Policy No.</b>	<b>Name of Insured</b>	<b>Owner of Policy</b>	<b>Type of Policy</b>	<b>Value</b>	<b>Primary and Contingent Beneficiaries</b>

**E. Annuities**

<b>Name of Company</b>	<b>Policy No.</b>	<b>Title Owner</b>	<b>Address</b>	<b>Face Value</b>	<b>Cash Value</b>	<b>Primary and Contingent Beneficiaries</b>

**F. Tangible Personal Property**

**1. Vehicles**

<b>Make</b>	<b>Model</b>	<b>Year</b>	<b>Vehicle Identification Number</b>	<b>Title Owner</b>

**2. Boats**

<b>Make</b>	<b>Model</b>	<b>Year</b>	<b>Vehicle Identification Number</b>	<b>Title Owner</b>

**3. Trailers and Other Titled Personal Property**

<b>Make</b>	<b>Model</b>	<b>Year</b>	<b>Vehicle Identification Number</b>	<b>Title Owner</b>

**4. Antiques/Collectibles**

<b>Description</b>	<b>Title Owner</b>	<b>Approximate Value</b>





**G. Estate, Trust and other Beneficiary Designations**

**1. Pending Estates**

<b>Decedent's Name</b>	<b>Personal Representative's Name</b>	<b>Address of Personal Representative</b>	<b>Type and Value of Asset to be Inherited</b>	<b>Court in Which Estate is Pending</b>	<b>Case No.</b>

**2. Trust Beneficiary Interests**

<b>Name of Trust</b>	<b>Name of Trustee</b>	<b>Person Who Created Trust</b>	<b>Date Created</b>	<b>State in Which Created</b>	<b>Current Value</b>

**H. Claims and Litigation**

<b>Claimant's Name</b>	<b>Assets Subject to the Claim</b>	<b>Court</b>	<b>Case No.</b>

**I. Benefits from Social Security, Medicaid, or other Government Programs or Civil or Military Service**

**1. Social Security Income**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**2. Medicare**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**3. Medicaid Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**4. Non-Retirement Civil Service Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**5. Military Retirement Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**6. Civil Service Retirement Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**7. Non-Governmental Retirement Benefits**

<b>Claimant's Name</b>	<b>Payee's name</b>	<b>Address</b>	<b>Amount of Benefit</b>	<b>Terms of Payment</b>

**J. Business Operating Transactions**

**1. Corporations**

<b>Corporation Name</b>	<b>Title Owner</b>	<b>Address</b>	<b>Shares</b>	<b>Value</b>

**2. Partnerships**

<b>Partnership Name</b>	<b>Title Owner</b>	<b>Address</b>	<b>Shares</b>	<b>Value</b>

**3. Sole Proprietorships**

<b>Sole Proprietorship Name</b>	<b>Title Owner</b>	<b>Address</b>	<b>Shares</b>	<b>Value</b>

**K. Pets**

<b>Type of Pet</b>	<b>Title Owner</b>	<b>Address</b>	<b>Name</b>	<b>Age</b>

**L. Livestock**

<b>Type of Livestock (including Breed)</b>	<b>Registration Name or Title Owner</b>	<b>Location</b>	<b>Description of Pregnant Animals</b>	<b>Approximate FMV</b>