



## **INTAKE SHEET FOR PRENUPTIAL OR COHABITATION AGREEMENT**

**Please answer all questions honestly and completely so that we may check for any potential conflicts of interest and so that we may properly evaluate your case.**

**-ALL INFORMATION CONTAINED HEREIN IS KEPT STRICTLY CONFIDENTIAL-**

TODAY'S DATE: \_\_\_\_\_

Is anyone accompanying you to the consultation? \_\_\_\_\_ If yes, please give names of each person and your relationship to each: \_\_\_\_\_

*\*\*Please be aware that by allowing a third party to sit in on your legal consultation, you are waiving any attorney-client privilege that may otherwise exist.*

### **I. PERSONAL INFORMATION**

Your full name: \_\_\_\_\_

Maiden Name (if applicable): \_\_\_\_\_

Name you prefer to be called: \_\_\_\_\_

Phone -Home: \_\_\_\_\_ wk: \_\_\_\_\_ cell: \_\_\_\_\_

Fax #: \_\_\_\_\_ E-mail address: \_\_\_\_\_

Your home address: \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

This residence is: ☐ permanent ☐ temporary – how long? \_\_\_\_\_

Others currently residing in same household, and relationship of each: \_\_\_\_\_

**May we send correspondence to you at the address listed above? ☐ YES ☐ NO**

**\* If no, where?** \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Social security #: \_\_\_\_\_

DL # and State: \_\_\_\_\_

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

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

How long at that job? \_\_\_\_\_ This job is: ☐ full time ☐ part time ☐ temporary

You are paid: ☐ Salary ☐ hourly wage ☐ commission ☐ other: \_\_\_\_\_



Do you receive bonuses? \_\_\_\_\_ If yes, how often? \_\_\_\_\_

How are you paid (every week, every other Friday, etc.): \_\_\_\_\_

Average gross monthly income from job: \_\_\_\_\_

Work schedule: \_\_\_\_\_

Are you required to travel for work? \_\_\_\_\_ If yes, how often? \_\_\_\_\_

List income from all other sources (disability, rental income, royalties, etc.): \_\_\_\_\_

Professional licenses or degrees held: \_\_\_\_\_

***Emergency Contact(s):***

1. Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

2. Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Relationship: \_\_\_\_\_

**II. INFORMATION ABOUT YOUR PARTNER :**

Full Name: \_\_\_\_\_

Maiden Name (if applicable): \_\_\_\_\_

Date of birth: \_\_\_\_\_ Place of birth (city, state): \_\_\_\_\_

Phone - home: \_\_\_\_\_ work: \_\_\_\_\_ cell: \_\_\_\_\_

E-mail address: \_\_\_\_\_ fax #: \_\_\_\_\_

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

\_\_\_\_\_ County: \_\_\_\_\_

Mailing address (if different from above): \_\_\_\_\_

Others currently residing in same household with him/her: \_\_\_\_\_

SS #: \_\_\_\_\_ DL # and State: \_\_\_\_\_

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

Employer's address: \_\_\_\_\_

How long at that job? \_\_\_\_\_ This job is: [ ] full time [ ] part time [ ] temporary

Spouse is paid: [ ] Salary [ ] hourly wage [ ] commissions [ ] other: \_\_\_\_\_

Does he/she receive bonuses? \_\_\_\_\_ If yes, how often? \_\_\_\_\_



Average gross monthly income from job:\_\_\_\_\_

Income from all other sources (disability, investments, royalties, etc.):\_\_\_\_\_

Describe his/her work schedule (days of week, times, etc.):\_\_\_\_\_

Is he/she required to travel for work? \_\_\_\_\_ If so, how often?\_\_\_\_\_

Professional licenses or degrees held:\_\_\_\_\_

### III. GENERAL INFORMATION:

Are there currently minor children from this relationship? [ ] NO [ ] YES

If yes, how many:\_\_\_\_\_Names and ages:\_\_\_\_\_

Expected Date of Marriage:\_\_\_\_\_

Place of Marriage (city, state):\_\_\_\_\_

Previous Marriages?\_\_\_\_\_

Are you and/or your future spouse currently in a bankruptcy?\_\_\_\_\_

If yes, when will the bankruptcy be completed?\_\_\_\_\_

Your main goals for the prenuptial agreement are:\_\_\_\_\_

What issues do you foresee with the negotiation of the prenuptial/cohabitation agreement:

### IV. JURISDICTION

	Yourself	Your Spouse	Your children
County of residence:			
How long in that county?			
How long in Texas?			
Prior county / state:			
How long there?			



**V. DEBTS AND ASSETS:**

**A. Real Property:**

Address of residence: \_\_\_\_\_  
\_\_\_\_\_ County: \_\_\_\_\_

Who is living in the home at this time? \_\_\_\_\_

Who is making the mortgage or rent payment at this time? \_\_\_\_\_

The residence is [ ] leased [ ] owned Amount of monthly payment: \$ \_\_\_\_\_

Name(s) on lease or note: \_\_\_\_\_

Name(s) on deed: \_\_\_\_\_

How was it acquired? (inheritance, gift, purchase, etc.) \_\_\_\_\_

Approximate date property was purchased or acquired: \_\_\_\_\_

What significant improvements have been made to the home and what is the value of the improvements? \_\_\_\_\_

Approximate value of home: \_\_\_\_\_

Total amount owed on home (all leins): \_\_\_\_\_

1<sup>st</sup> leinholder: \_\_\_\_\_

Amount owed on loan: \_\_\_\_\_ Monthly payment: \_\_\_\_\_

Name(s) on note: \_\_\_\_\_

2<sup>nd</sup> leinholder: \_\_\_\_\_

Amount owed on loan: \_\_\_\_\_ Monthly payment: \_\_\_\_\_

Name(s) on note: \_\_\_\_\_

**B. Other real property owned (land, rent houses, etc.)**

1. Address: \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

How was it acquired? (inheritance, gift, purchase, etc.) \_\_\_\_\_

When acquired (approximate date)? \_\_\_\_\_

What is the property being used for? \_\_\_\_\_

Amount of monthly income received from this property: \_\_\_\_\_

Approximate value: \_\_\_\_\_ Amount owed: \_\_\_\_\_

Monthly payment: \_\_\_\_\_ Leinholder: \_\_\_\_\_



Improvements on property: \_\_\_\_\_

Other owners, and percentages of ownership: \_\_\_\_\_

2. Address: \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

How was it acquired? (inheritance, gift, purchase, etc.) \_\_\_\_\_

When acquired (approximate date)? \_\_\_\_\_

What is the property being used for? \_\_\_\_\_

Amount of monthly income received from this property: \_\_\_\_\_

Approximate value: \_\_\_\_\_ Amount owed: \_\_\_\_\_

Monthly payment: \_\_\_\_\_ Leinholder: \_\_\_\_\_

Improvements on property: \_\_\_\_\_

Other owners, and percentages of ownership: \_\_\_\_\_

3. Address: \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

How was it acquired? (inheritance, gift, purchase, etc.) \_\_\_\_\_

When acquired (approximate date)? \_\_\_\_\_

What is the property being used for? \_\_\_\_\_

Amount of monthly income received from this property: \_\_\_\_\_

Approximate value: \_\_\_\_\_ Amount owed: \_\_\_\_\_

Monthly payment: \_\_\_\_\_ Leinholder: \_\_\_\_\_

Improvements on property: \_\_\_\_\_

Other owners, and percentages of ownership: \_\_\_\_\_

### C. Mineral Rights

a. Property Address : \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

Amount per month: \_\_\_\_\_ Term of lease: \_\_\_\_\_

When and how acquired: \_\_\_\_\_

b. Property Address : \_\_\_\_\_

\_\_\_\_\_ County: \_\_\_\_\_

Amount per month: \_\_\_\_\_ Term of lease: \_\_\_\_\_

When and how acquired: \_\_\_\_\_



**D. Businesses owned by either party:**

1. Registered Name of company: \_\_\_\_\_

Type of business: \_\_\_\_\_

When acquired or formed: \_\_\_\_\_

By whom? \_\_\_\_\_

Capacity that each party is involved: \_\_\_\_\_

\_\_\_\_\_

Other owners, partners, and percentage of ownership of each: \_\_\_\_\_

\_\_\_\_\_

Approximate annual income earned from this business: \_\_\_\_\_

Approximate value of company: \_\_\_\_\_

Nature and value of hard assets owned by company (i.e., equipment, furniture, etc.)

\_\_\_\_\_

\_\_\_\_\_

2. Registered Name of company: \_\_\_\_\_

Type of business: \_\_\_\_\_

When acquired or formed: \_\_\_\_\_

By whom? \_\_\_\_\_

Capacity that each party is involved: \_\_\_\_\_

\_\_\_\_\_

Other owners, partners, and percentage of ownership of each: \_\_\_\_\_

\_\_\_\_\_

Approximate annual income earned from this business: \_\_\_\_\_

Approximate value of company: \_\_\_\_\_

Nature and value of hard assets owned by company (i.e., equipment, furniture, etc.)

\_\_\_\_\_

\_\_\_\_\_

**E. Vehicles (owned or leased):**

1. **Vehicle driven primarily by you** (year, model, make): \_\_\_\_\_

\_\_\_\_\_

VIN: \_\_\_\_\_

Owned or leased? \_\_\_\_\_ Monthly payment: \_\_\_\_\_



Name(s) on the lease or note: \_\_\_\_\_

Leinholder: \_\_\_\_\_

Amt owed on vehicle: \_\_\_\_\_ Approximate value: \_\_\_\_\_

Is this vehicle used for work related purposes? \_\_\_\_\_

2. **Vehicle driven primarily by *your future spouse*** (year, make, model): \_\_\_\_\_

\_\_\_\_\_

VIN: \_\_\_\_\_

Owned or leased? \_\_\_\_\_ Monthly payment: \_\_\_\_\_

Name(s) on the lease or note: \_\_\_\_\_

Leinholder: \_\_\_\_\_

Amt owed on vehicle: \_\_\_\_\_ Approximate value: \_\_\_\_\_

Is this vehicle used for work related purposes? \_\_\_\_\_

3. Other vehicles owned (boats, planes, 4-wheelers, etc.)

a. Type: \_\_\_\_\_

VIN: \_\_\_\_\_

Owned or leased? \_\_\_\_\_ Monthly payment: \_\_\_\_\_

Name(s) on the lease or note: \_\_\_\_\_

Leinholder: \_\_\_\_\_

Amt owed on vehicle: \_\_\_\_\_ Approximate value: \_\_\_\_\_

Is this vehicle used for work related purposes? \_\_\_\_\_

b. Type: \_\_\_\_\_

VIN: \_\_\_\_\_

Owned or leased? \_\_\_\_\_ Monthly payment: \_\_\_\_\_

Name(s) on the lease or note: \_\_\_\_\_

Leinholder: \_\_\_\_\_

Amt owed on vehicle: \_\_\_\_\_ Approximate value: \_\_\_\_\_

Is this vehicle used for work related purposes? \_\_\_\_\_

**F. Separate property not otherwise listed above:**

**1. Yours—**

a. All other property of significant value (artwork, equipment, appliances, etc.)

; include values and location of property: \_\_\_\_\_



- \_\_\_\_\_
- \_\_\_\_\_
- b. List all property of significant value that you have received *as a result of a gift or inheritance*; include date acquired and location of property: \_\_\_\_\_
- \_\_\_\_\_
- c. List funds you have received *as a result of a personal injury settlement*: \_\_\_\_\_
- \_\_\_\_\_
- When and where were funds deposited? \_\_\_\_\_

**2. Future Partner's—**

- a. All other property of significant value (artwork, equipment, appliances, etc.)  
; include values and location of property:
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- b. List all property of significant value that your future spouse received *as a result of a gift or inheritance*; include date acquired and location of property: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- c. List funds your future spouse has received *as a result of a personal injury settlement*: \_\_\_\_\_
- When and where were funds deposited? \_\_\_\_\_

**G. Savings accounts, checking accounts**

	Banking Institution	Amount	In whose name
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____



**H. Life insurance policies, amounts, beneficiaries:**

***For you:***

	<u>Insurance company</u>	<u>Whole or Term</u>	<u>Value</u>	<u>Beneficiary</u>
1.				
2.				

***For your future spouse:***

	<u>Insurance company</u>	<u>Whole or Term</u>	<u>Value</u>	<u>Beneficiary</u>
1.				
2.				

**I. Retirement Benefits**

***For you:***

	<u>Name/type of account</u>	<u>Value</u>	<u>Date Acquired</u>
1.			
2.			
3.			

***For your future spouse:***

	<u>Name/type of account</u>	<u>Value</u>	<u>Date Acquired</u>
1.			
2.			
3.			

**J. Other investments: (type, amount, in whose name, etc.)**

1.	
2.	
3.	
4.	

**K. Airline miles, gym memberships, club memberships, etc:**

1. In your name:

a. \_\_\_\_\_

b. \_\_\_\_\_

2. In your future spouse's name:

a. \_\_\_\_\_

b. \_\_\_\_\_



**L. Separate Debts**

1. Yours: List all existing debt incurred by you before the marriage, and all student loans

Incurred by you at any time (including creditor names and amounts):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

2. Your Future Spouse's: List all debt incurred by your spouse before the marriage, and all student loans incurred by your spouse at any time (include creditor names and amounts):

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

**M. Community Debts:**

Other than student loans, list all existing debt that you have acquired together before the marriage date and any that you anticipate will be incurred *during the marriage*, regardless of whose name it is in:

Creditor	Amount of debt	In whose name	Purpose of debt
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- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

Ideally, how would you like to see the community debt distributed? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Ideally, how would you like to see community property distributed? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Other children:**

1. Do *you* have minor children that are NOT of this relationship? ☐ NO ☐ YES how many? \_\_\_\_\_  
Who do they live with? \_\_\_\_\_ Who has legal custody? \_\_\_\_\_  
You are: ☐ paying child support ☐ receiving child support ☐ neither  
Amount: \$ \_\_\_\_\_ per \_\_\_\_\_
  2. Does *your future spouse* have minor children that are NOT of this marriage: ☐ NO ☐ YES  
If yes, how many? \_\_\_\_\_ Who do they live with? \_\_\_\_\_  
Who has legal custody? \_\_\_\_\_  
Your spouse is: ☐ paying child support ☐ receiving child support ☐ neither  
Amount: \$ \_\_\_\_\_ per \_\_\_\_\_
- 

**XI. Please sign below if this information is true and complete to the best of your knowledge:**

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_

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