



INTAKE SHEET FOR POST-NUPTIAL AGREEMENT

Return to legal@danawhitefamilylaw.com

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 SPOUSE:

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 ABOUT THE MARRIAGE:

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

If yes, how many: _____

Names and ages:

Date of Marriage: _____

Place of Marriage (city, state): _____

Previous Marriages? _____

Are you and/or your spouse currently in a bankruptcy? _____

If yes, when will the bankruptcy be completed? _____

Your main goals for the postnuptial agreement are: _____



What issues do you foresee with the negotiation of the postnuptial 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 liens): _____

1st lienholder: _____

Amount owed on loan: _____ Monthly payment: _____

Name(s) on note: _____

2nd lienholder: _____

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: _____ Lienholder: _____

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: _____ Lienholder: _____

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: _____ Lienholder: _____

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: _____
Lienholder: _____
Amt owed on vehicle: _____ Approximate value: _____
Is this vehicle used for work related purposes? _____

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

VIN: _____
Owned or leased? _____ Monthly payment: _____
Name(s) on the lease or note: _____
Lienholder: _____
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: _____
Lienholder: _____
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: _____

Lienholder: _____

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? _____

4. Spouse'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 spouse received *as a result of a gift or inheritance*; include date acquired and location of property: _____

c. List funds your 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
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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 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 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 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 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 *during the marriage*, regardless of whose name it is in:

<u>Creditor</u>	<u>Amount of debt</u>	<u>In whose name</u>	<u>Purpose of debt</u>
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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 NOT of this marriage:

1. Do *you* have minor children that are NOT of this relationship? NO YES

If 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 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: _____
