

# 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? \_\_\_\_\_

Will you be the Husband or the Wife in this marriage? \_\_\_\_\_

Have the wedding invitations been sent out? Y or N

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

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

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

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

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

Your **main goals** for the prenuptial agreement are as follows: (to separate inheritance or gifts; to address assets in the event of divorce; to address assets in the event of death; to provide spousal support, etc).

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

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

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

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

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



**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):

\_\_\_\_\_

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

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

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

Level of Education: \_\_\_\_\_

**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: \$ \_\_\_\_\_

Level of Education: \_\_\_\_\_

**C. Children (if applicable)**

Full Legal Name	DOB	SSN	Where does the child reside?	Other Parent

**III. SOURCES OF INCOME**

*Each person must make a full and complete financial disclosure to the other. The information contained in this form will be disclosed to the other spouse. If there are any assets not specifically identified in this form, please include those assets at the end.*

<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

**IV. ASSETS**

**A. Real Property**

<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. Cash Accounts**

<u>Type</u>	<u>Bank</u>	<u>Account No. (Last 4 Digits)</u>	<u>Approximate Value (date)</u>	<u>Title Owner(s)</u>

**C. Retirement Accounts, Stocks, Bonds, Annuities & Other Accounts**

<u>Type</u>	<u>Financial Institution</u>	<u>Account No. (Last 4 Digits)</u>	<u>Approximate Value (date)</u>	<u>Title Owner(s)</u>


**D. Notes/Accounts Receivable**

Owed By	Account No.	Amount Due	Due Date	Purpose

**E. Life Insurance**

Type	Insurer	Title Owner	Face Value	Beneficiaries

**F. Business Interests**

Name	Type of Entity	State Organized	Ownership Interest	Estimated Value (if Known)

**G. Other Property**

Description	Title Owner(s)	FMV

**H. Pets & Other Animals**

Name	Type of Animal	Title Owner

*A list of livestock and horses should be provided under separate cover, if applicable.*

**V. LIABILITIES/DEBTS**

Type of Debt	Financial Institution	Account No. (Last 4 Digits)	Approximate Liability (Date)	Debtors/ Title Owner