

**PRENUPTIAL AGREEMENT QUESTIONNAIRE**

We recognize that this information is of a personal nature. We assure you that all information provided to this office will be treated confidentially and will not be revealed to anyone outside of this office without your permission.

**GENERAL INFORMATION**

Date: \_\_\_\_\_

**Name** (as you want it on legal documents) \_\_\_\_\_

Nickname (if any) \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Cell phone \_\_\_\_\_ Email \_\_\_\_\_

Date of Birth \_\_\_\_\_ Soc. Sec. #: \_\_\_\_\_

Employer \_\_\_\_\_ Position \_\_\_\_\_

**Fiance's Name** (as it will appear on legal documents) \_\_\_\_\_

Nickname (if any) \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Cell phone \_\_\_\_\_ Email \_\_\_\_\_

**Proposed Wedding Date** \_\_\_\_\_

|                              |                |                  |            |
|------------------------------|----------------|------------------|------------|
| <b>Your Children's Names</b> | <b>Address</b> | <b>Phone No.</b> | <b>DOB</b> |
|------------------------------|----------------|------------------|------------|

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|                                  |                |                  |            |
|----------------------------------|----------------|------------------|------------|
| <b>Fiance's Children's Names</b> | <b>Address</b> | <b>Phone No.</b> | <b>DOB</b> |
|----------------------------------|----------------|------------------|------------|

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6. Do you hold any STOCKS, BONDS or MUTUAL FUNDS (not in a brokerage acct)?

| <b>Name of Company</b> | <b>Name(s) on Title</b> | <b>Current Value</b> |
|------------------------|-------------------------|----------------------|
| _____                  | _____                   | _____                |
| _____                  | _____                   | _____                |
| _____                  | _____                   | _____                |

7. Do you have any LIFE INSURANCE POLICIES and/or ANNUITIES?

| <b>Company Name</b> | <b>Policy Owner</b> | <b>Insured</b> | <b>Beneficiary</b> | <b>Face Value</b> |
|---------------------|---------------------|----------------|--------------------|-------------------|
| _____               | _____               | _____          | _____              | _____             |
| _____               | _____               | _____          | _____              | _____             |
| _____               | _____               | _____          | _____              | _____             |

8. Do you have a BUSINESS INTEREST/OWNERSHIP?

| <b>Company Name</b> | <b>Your Percentage</b> | <b>Market Value</b> |
|---------------------|------------------------|---------------------|
| _____               | _____                  | _____               |
| _____               | _____                  | _____               |

9. Do you have any COLLECTIBLES (antiques, coins, jewelry, etc.)?

| <b>Description</b> | <b>Market Value</b> |
|--------------------|---------------------|
| _____              | _____               |
| _____              | _____               |

10. Does anyone OWE YOU money (mortgage, personal loan, etc.)?

| <b>Name of Person who owes</b> | <b>Amount owed</b> |
|--------------------------------|--------------------|
| _____                          | _____              |
| _____                          | _____              |

11. Do you have a SAFE DEPOSIT BOX?

| <b>Name of Bank</b> | <b>Names on Box</b> | <b>Value of Contents</b> |
|---------------------|---------------------|--------------------------|
| _____               | _____               | _____                    |
| _____               | _____               | _____                    |

12. Do you own any PATENTS or COPYRIGHTED material (or ever sold any copyrighted material)?

|       |
|-------|
| _____ |
| _____ |

13. YEARLY INCOME \$ \_\_\_\_\_

14. Please let me know if someone referred you to us that we may thank.

Referred By: \_\_\_\_\_

Phone: \_\_\_\_\_

15. Do you have any specific questions?

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### **DOCUMENTS TO BRING WITH YOU**

Please provide copies of these documents and any documents relating to other assets you own.

- Wills and Trusts
- Powers of Attorney
- Health Care Powers/Living Wills
- Divorce papers (if previously married)
- Deeds and real estate tax bills
- Recent Statement from Banks and Brokerages
- IRA and Retirement Plan statements
- Copies of stocks and bonds you hold
- Corporation or business papers
- Life Insurance and Annuity contracts
- Copies of Car and boat titles and registrations