



PRE AND POST MARITAL AGREEMENT QUESTIONNAIRE

Date _____

Referred By: _____

Your Name (full name): _____

U.S. Citizen: Yes No Citizenship: _____

Address: _____

Date of Birth: ____ / ____ / ____

Telephone No.: ()

Cellular No.: ()

Other No.: ()

Fax No.: ()

Email:

County of Residence:

Spouse/Future Spouse/Partner's Name (full name): _____

_____ U.S. Citizen: Yes No Citizenship: _____

Address: _____

Date of Birth: ____ / ____ / ____

Telephone No.: ()

Cellular No.: ()

Other No.: ()

Fax No.: ()

Email:

County of Residence:

Insurance: Do you have ARAG legal insurance? Yes No If so, is your spouse/partner included in your coverage? Yes No Do Not Know

YOUR FAMILY INFORMATION

CHILDREN(S):

<u>NAME</u>	<u>BIRTH DATE</u>	<u>CHILD OF:</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Deceased Children? ___Yes ___No

If yes, please provide name(s) and date(s) of death: _____

Prior marriages? Yes No

Marriage was terminated by Death Dissolution of Marriage

Date of death of spouse _____ Date of Dissolution _____

Please provide full name of former spouse(s): *Use extra sheet if more room needed.*

Children of former marriage? Yes No

(Indicate if named above.)

<u>NAME</u>	<u>BIRTH DATE</u>
_____	_____
_____	_____

YOUR SPOUSE/FUTURE SPOUSE/PARTNER'S FAMILY INFORMATION

CHILDREN(S):

<u>NAME</u>	<u>BIRTH DATE</u>	<u>CHILD OF:</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Deceased Children? ___Yes ___No

If yes, please provide name(s) and date(s) of death: _____

Prior marriages? Yes No

Marriage was terminated by Death Dissolution of Marriage

Date of death of spouse _____ Date of Dissolution _____

Please provide full name of former spouse(s): *Use extra sheet if more room needed.*

Children of former marriage? Yes No
(Indicate if named above.)

NAME

BIRTH DATE

SIGNIFICANT DATES:

Date of Marriage or Planned Marriage Date: _____

Any other significant dates (Please list):

ASSET INFORMATION AND CHARACTER

CLIENT 1

SEPARATE PROPERTY/PREMARITAL PROPERTY AND DEBTS/LIABILITIES

It is **crucial** you provide all asset information for a marital or premarital agreement to be valid.

REAL PROPERTY:

Address:

Fair market value \$ _____

Mortgage: \$ _____

NET: \$ _____

Fair market value \$ _____

Mortgage: \$ _____

NET: \$ _____

Fair market value \$ _____

Mortgage: \$ _____

NET: \$ _____

Check box if you have additional real property and attach information.

Banking Institution(s):

Type of Account

Average Balance

Example: Wells Fargo

Checking/Savings

\$1,500/\$7500

Check box if additional banking information is attached

Investments & Institution **Type of Account** **Value**
(List all CDs, Stocks, Bonds, Mutual Funds, Securities, etc.)

Check box if additional investment information is attached

Retirement & Insurance **Type of Account/Policy** **Value/Death Benefit**
(List all IRAs, employee retirement, 401(k)s, life insurance, etc.)

Check box if additional retirement/insurance information is attached

Business Interests: *(LLCs, Sole Proprietorships, Corporations, Partnerships)*

Type of Entity:

Stock or Ownership Interest:

Partners, Members or Shareholder/Director(s)' Names: _____

Buy/Sell Agreement? Yes No

Number of Employees: _____

Other Assets: *(Vehicles, tangible personal property, expected inheritance, promissory notes, mineral rights, etc.)*

Debts: *(List all debts and liabilities, including mortgages, vehicle notes, credit card debt, support obligations, etc.)*

ASSET INFORMATION AND CHARACTER

SPOUSE/FUTURE SPOUSE/PARTNER

SEPARATE PROPERTY/PREMARITAL PROPERTY AND DEBTS/LIABILITIES

It is **crucial** you provide all asset information for a marital or premarital agreement to be valid.

REAL PROPERTY:

Address:

Fair market value \$ _____
Mortgage: \$ _____
NET: \$ _____

Fair market value \$ _____
Mortgage: \$ _____
NET: \$ _____

Fair market value \$ _____
Mortgage: \$ _____
NET: \$ _____

Check box if you have additional real property and attach information.

Banking Institution(s):

Type of Account

Average Balance

Example: Wells Fargo

Checking/Savings

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Investments & Institution

Type of Account

Value

(List all CDs, Stocks, Bonds, Mutual Funds, Securities, etc.)

Check box if additional investment information is attached

Retirement & Insurance

Type of Account/Policy

Value/Death Benefit

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Other Assets: *(Vehicles, tangible personal property, expected inheritance, promissory notes, mineral rights, etc.)*

Debts: *(List all debts and liabilities, including mortgages, vehicle notes, credit card debt, support obligations, etc.)*

**INTENTIONS REGARDING CURRENTLY HELD AND FUTURE
ACQUIRED PROPERTY, INCOME, INHERITANCE, ASSETS JOINTLY ACQUIRED
PRIOR TO MARRIAGE OR AGREEMENT**

Is there property or assets you now own that you intend NOT be your separate property? Please list:

Is there property or assets you acquired with your spouse/future spouse/partner during your nonmarital relationship or prior to the execution of this Agreement?

Yes No

If yes, please list assets:

Do you intend that these assets be community property? Yes No If no, please explain:

Income after marriage or agreement.

Do you intend your income to be your separate or community property?

Separate Community

Reimbursement for Separate Property contributions to Separate assets of your Spouse/Future Spouse/Partner:

If your spouse/future spouse/partner contributes separate property to the improvement or repair of your separate property, do you want them to be allowed reimbursement for said contribution?

Yes No

If you contribute separate property to the improvement or repair of your spouse/future spouse/partner separate property, do you want to be reimbursed for said contribution?

Yes No

If your spouse/future spouse/partner contributes separate property to the improvement or repair of a community property asset, do you want them to be allowed reimbursement for said contribution?

Yes No

If you contribute separate property to the improvement or repair of a community property asset, do you want to be reimbursed for said contribution?

Yes No

Inheritance and post-death rights.

Even if your agreement contains a waiver of inheritance and/or post-death rights for your spouse/future spouse/partner, you may still name them as beneficiaries in your Will/Trust/Estate Plan. There are other ways for your spouse/future spouse/partner to obtain benefits from your estate or assets after death.

Do you want to have your spouse/future spouse/partner waive the right to receive post-death benefits from your estate?

Yes No

SPOUSE/FUTURE SPOUSE/PARTNER’S LEGAL REPRESENTATION:

Contact information for your spouse/future spouse/partner’s attorney:

Name: _____

Address: _____

Phone: (____)_____ Fax (____)_____

Email: _____@_____