

CONFIDENTIAL CLIENT HISTORY AND GOALS

The following information is needed by Attorney ----- in order to properly prepare for either a settlement or contest in your divorce. Please answer each of the following questions fully and in writing. Your thoughtful and complete answers should be provided to Attorney ----- within three weeks of your receipt of this request.

1. Length of Marriage

- A. Provide a chronological history of the marriage from the date you first met to the present.
- B. Set forth the high and low points of the marriage indicating dates, times, events and locations to the best of your recollection.

Examples: Daily activities and weekend activities.
Vacations with or without the family.
Child bearing. Set forth each experience.
Relationships with relatives and in-laws.
Effect of employment on the marriage.
Particular events in the marriage.

- C. Provide a complete history of the wife from adulthood to the present, including:
 - 1. Family background.
 - 2. Her education to the present time.
 - 3. Her employment to the present time.
- D. Provide a complete history of the husband from adulthood to the present, including:
 - 1. Family background.
 - 2. His education to the present time.
 - 3. His employment history to the present time.
- E. Provide a history of the children, including:
 - 1. Names, date and place of birth.
 - 2. Present address.
 - 3. Background of each child leading up to the present including education, health, and relationship with each parent.

2. Conduct of the Parties During the Marriage

- A. Treatment towards each other.
- B. Emotional/Verbal Abuse and Physical Abuse (assault):
 - 1. Describe each incident with dates and places.
 - 2. If police were called, state the name of the department, reports made, and arrests.
 - 3. If medical, psychological or social help was sought, state the name and address of each provider.
 - 4. State the name and address of all witnesses and persons you have told of these events.
- C. Absenteeism from the home:
 - 1. Reasons- social, business, extra curricular activity.

3. Health of the Parties

- A. Give a complete medical history of yourself.
- B. Give a complete medical history of your spouse.
- C. For you and your spouse, list the names and addresses of all hospitals, clinics, outpatient facilities, extended care, and nursing homes or other attended institution.
- D. For you and your spouse, list the names and addresses of all doctors attended.
- E. Provide available medical records on past and present problems concerning yourself.

4. Station (Status) of the Parties

- A. Organizations in which either of you participated
- B. Memberships for either of you
- C. Clubs
- D. Describe your standards of living, providing examples.

5. Occupation of the Parties

- A. Wife:
 - 1. Present employer name and address. If not employed outside the home, state when and where last employed, and reasons for not being employed.
 - 2. Duties and responsibilities - present and future.

3. Job description.
- B. Husband:
1. Present employer name and address. If not employed outside the home, state when and where last employed, and reasons for not being employed.
 2. Duties and responsibilities - present and future.
 3. Job description.

6. Amount and Sources of Income of the Parties

- A. List the amounts and sources of income for both parties:

Examples:	Employment	Real Estate Investments
	Stocks	Pension/Retirement Plans
	Bonds	Life Insurance Proceeds
	Mutual Funds	Annuities
	Bank Accounts	Trust Funds

Other Income Sources and amounts - List Each

7. Vocational Skills of the Parties

- A. List your vocational skills and your spouse's vocational skills.
- B. Provide information about your education, schools attended, degrees received.
- C. Provide information about what contributions each party made to the education of the other and what money was paid during the marriage to further either party's education, vocational skills or employability.

8. Employability of the Parties

- A. Provide information about each party's physical and mental ability to be employed.
- B. Give a history of employment and efforts to seek employment.

9. Liabilities of the Parties

- A. List all of the outstanding mortgages and lines of credit secured by real property that are in your name or your spouse's name, or jointly owed. For each, state:
1. Names and addresses of the mortgage company or bank.
 2. The principal amount of outstanding debt on each mortgage.
 3. The amount of the monthly or other periodic payment.

B. List all outstanding amounts owed for all other debts. For each, state:

1. Name and address of the creditor.
2. Reason for the debt.
3. Who incurred the debt.
4. Who signed for the debt.
 - (i) Promissory note?
 - (ii) Credit card?
5. Who has possession of property related to debt.
6. Original amount of the debt.
7. Present balance.
8. Periodic payment - interval and amount.

Add up the total indebtedness and write it here: \$ _____

10. Needs of the Parties

- A. Describe your standard of living.
- B. Please complete the Family Court Financial Statement (DR6) given to you at your initial meeting with your attorney. Add to the form or on a separate paper your needs for reading materials, entertainment, charities, gifts and gratuities, health and fitness, hobbies, vacations, hired help, education, taxes, and all of your other costs and expenses for maintaining the lifestyle you now enjoy. Please be certain you have listed all of your expenses. You should refer to your financial records when preparing this information.
- C. State the total amount of weekly support you feel you need from your spouse.

11. Opportunity of the Parties to Acquire Future Capital Assets

- A. Indicate the wife's opportunities to acquire future capital assets.
- B. Indicate the husband's opportunities to acquire future capital assets.

12. Opportunity of the Parties to Acquire Future Income

- A. Indicate the wife's opportunities to acquire future income.
- B. Indicate the husband's opportunities to acquire future income.

13. Contribution of the Parties in the Acquisition of the Marital Estate

- A. Provide a list or schedule of the marital assets including real estate, savings, investment accounts, retirement accounts, art, furniture, antiques, boats, high value motor vehicles, etc. For each, include the date of acquisition, price paid and present fair market value.
- B. What did the wife contribute to the acquisition of the marital estate.
- C. What did the husband contribute to the acquisition of the marital estate.
- D. What did the wife's family or children contribute and when.
- E. What did the husband's family or children contribute and when.

14. Contribution of the Parties in the Preservation of the Marital Estate

- A. Who handled the monies; and who earned the monies.
- B. Who established the standard of living.
- C. Which spouse did the economizing or saving in order to accumulate wealth.

15. Contribution of the Parties in the Appreciation of the Marital Estate

- A. What each spouse did to maintain their properties. Examples: Upkeep of real estate, maintenance, improvements, planning; both financial and nonfinancial help should be explained.
- B. Which spouse maintained bank books, stock, life insurance and reinvested interest and dividends.

16. Contribution of each Party as Homemaker to the Family

- A. What each spouse did to keep the family together.
- B. What did each spouse do to care for the many needs of the children.
- C. Describe the process used to maintain family love and respect relative to the health, education, and welfare of the children.
- D. Describe what each spouse contributed to this process in detail.

17. Please provide additional information if you foresee the following problems in dealing with your spouse: fear, distrust, dishonesty, unwillingness to compromise, use of children as a weapon, violence, other problems: _____
- _____

_____.

18. I have already made some decisions about what outcome I would like with respect to property, children, support, my goals and the conduct of this case, as follows: _____

19. Please add any questions, issues, or anything else you want considered by your attorney or the Family Court as part of your divorce: _____

YOUR CREDIT REPORT

If you have decided to move forward and file for a divorce, one of the **FIRST** things you should do while gathering information about your financial situation, is to obtain a copy of your credit reports from Transunion, Experian and Equifax.

By doing this, you may learn of debt in your name that you were unaware of.

There is a national clearing house, established under federal law, to fill orders for annual free credit reports. This is **NOT** the same as the advertised programs for a "free" credit report. The national clearing house does not charge for its services. Please obtain your credit reports by doing the following.

CALL: Annual Credit Report, toll-free at 1-877-322-8228.

WRITE: Annual Credit Report Request Service
P.O. Box 105281
Atlanta, GA 30348-5281

VISIT: www.AnnualCreditReport.com

Should you be required to apply for a loan for any reason, you may also want to check your FICO score. This score is your credit "rating" and it can, in most cases, determine your interest rate on a loan. There is a fee to obtain your FICO credit score.

VISIT: www.MyFico.com

Steps that can raise your credit score:

1. Make your payments on time.
2. Don't acquire new debt.
3. Pay more than the minimum amount due.
4. Engage the services of a Certified Financial Planner.