

PRENUPTIAL AGREEMENT DISCLOSURE WORKSHEET

CLIENT INFORMATION

Full legal name: _____

Maiden Name (if applicable): _____

Current address: _____

Date of birth: _____

INTENDED SPOUSE'S INFORMATION

Is your intended spouse represented by an attorney?

Would you like me to refer an attorney for your intended spouse to have the agreement reviewed?

Full legal name: _____

Maiden Name (if applicable): _____

Current address: _____

Current phone number: _____

Cell phone number (if different): _____

Email: _____

Date of birth: _____

GENERAL INFORMATION:

When do you intend to marry?

Have you lived together?

If so, for how long?

CHILDREN:

Please list any children either party has prior to the marriage:

FULL NAME	DATE OF BIRTH		PARENTS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

1. If there are children outside of the marriage, please describe who has custody of those children and who pays support:

CLIENT QUESTIONS:

1. How do the parties intend to treat separate property or the purchase of marital property with the use of separate property?
2. How do the parties feel about spousal support? If limiting spousal support, must disclose list of income and description of ability to earn income in the future
3. Is the client going to receive future gifts or inheritance? How do the parties intend to treat future inheritance?
4. Will the premarital agreement terminate on a certain event, such as having children, staying married for a certain number of years, or fault by one of the parties such as an extramarital affair or alcohol/drug abuse? Or would the agreement be renegotiated within a certain number of years or after a specific event such as after the birth of a child?
5. If the client owns a business, what type of business is it and how will it be treated during the marriage?

**EXHIBIT A
FINANCIAL DISCLOSURE**

In making a prenuptial agreement, each person has to 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. If you need help in completing any item, please let us know.

If possible, please provide copies of this information, along with documentation for the items on the sheet (i.e., bank statement, appraisals, etc.). A copy of your Federal Income Tax return for the past year and a recent copy of your pay stub or year-to-date income is also helpful.

HUSBAND FINANCIAL INFORMATION:

- Husband's occupation:
- Employer:
- Monthly Gross Income (before taxes):
- Monthly Net Income (after taxes):
- Highest level of education:
- How long have you been employed in this profession?
- Please describe any additional income:

ASSETS

Enter the value of each of the following items of property as precisely as you can. Also identify the property as precisely as possible, including account numbers, names of banks, etc.

	Fair market value	Amt Owed (if any)
A. Real Estate (Residence, Vacation Home, and Rental/investment):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
B. Bank Accounts and Saving Accounts:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
C. Notes, Accounts, (i.e. money owed to you. Indicate by whom payable, amount, and date or dates payable. Include money owed by other spouse):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
D. Stocks, Bonds, Mutual Funds:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

Fair market value Amt Owed (if any)

E. Life Insurance – Name of Company, Cash-out value (if any) Death Benefit Policy Number, Face Value, Type (i.e. “term,” “whole life,” etc.):

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

F. Business or Professional Interests Appraised or Fair Business Loans (if any)
 (Please furnish last balance sheet market value and P&L statement, tax return, buy sell agreements, etc.):

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

G. Miscellaneous Assets – Patents Trademarks, Copyrights, Royalties Stock Options, etc.:

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

H. Personal Effects, Tangible Personal Property (valued at \$500 or more):

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

I. Automobiles, motorcycles, other vehicles

\$ _____*	_____
_____	_____
_____	_____

* Use Kelly Blue Book (www.kbb.com) if unsure of value

TOTAL ASSETS _____

I. Pension plans, Keogh, IRAs, Current Statement value Loans (if any) Profit Sharing Plans, 401(k):

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

II. Defined Benefit Pension Plans (other non-contribution plans)

Attach a copy of most recent statement

_____	\$ _____	_____
_____	_____	_____

LIABILITIES

	Amount owed	Owed to whom:
Amount Owed Card name & Last 4 digits of account		
A. Credit Card Debt:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____
B. Loans owed to Banks and Others:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____
C. Student Loans:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____
D. Other Debts:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____

Disclosure of Future Inheritance

There is no obligation to disclose his or her family's wealth, and, in some cases, may not be able to do so. However, when a party has a reasonable expectation of a substantial future inheritance, it will often be in that party's interest to make some disclosure. When a party has vested interests, such as beneficiary rights in an irrevocable trust, he or she should disclose the essential terms of the interest and its approximate value.

Assets included in the inheritances (Investment Accounts, Trusts):

	Fair market value
_____	\$ _____
_____	_____
_____	_____

**EXHIBIT B
FINANCIAL DISCLOSURE**

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If possible, please provide copies of this information, along with documentation for the items on the sheet (i.e., bank statement, appraisals, etc.). A copy of your Federal Income Tax return for the past year and a recent copy of your pay stub or year-to-date income is also helpful.

WIFE FINANCIAL INFORMATION:

Wife's occupation:

Employer:

Monthly Gross Income (before taxes):

Monthly Net Income (after taxes):

Highest level of education:

How long have you been employed in this profession?

Please describe any additional income:

ASSETS

Enter the value of each of the following items of property as precisely as you can. Also identify the property as precisely as possible, including account numbers, names of banks, etc.

	Fair market value	Amt Owed (if any)
A. Real Estate (Residence, Vacation Home, and Rental/investment):		
_____	\$ _____	_____
_____	_____	_____
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B. Bank Accounts and Saving Accounts:		
_____	\$ _____	_____
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C. Notes, Accounts, (i.e. money owed to you. Indicate by whom payable, amount, and date or dates payable. Include money owed by other spouse):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
D. Stocks, Bonds, Mutual Funds:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

Fair market value Amt Owed (if any)

E. Life Insurance – Name of Company, Cash-out value (if any) Death Benefit Policy Number, Face Value, Type (i.e. “term,” “whole life,” etc.):

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

F. Business or Professional Interests Appraised or Fair Business Loans (if any)
 (Please furnish last balance sheet market value and P&L statement, tax return, buy sell agreements, etc.):

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I. Automobiles, motorcycles, other vehicles

\$ _____*	_____
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_____	_____	_____

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	Amount owed	Owed to whom:
Amount Owed Card name & Last 4 digits of account		
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_____ \$	_____	_____
_____	_____	_____
_____	_____	_____
B. Loans owed to Banks and Others:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____
C. Student Loans:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____
D. Other Debts:		
_____ \$	_____	_____
_____	_____	_____
_____	_____	_____

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Assets included in the inheritances (Investment Accounts, Trusts):

	Fair market value
_____	\$ _____
_____	_____
_____	_____

Dated: _____

/s/ _____

Print Name _____

Dated: _____

/s/ _____

Print Name _____