FAMILY LAW CLIENT INTAKE FORM

CLIENT NAME: _____

ADDRESS: _____

MAILING ADDRESS: _____
(IF DIFFERENT FROM ABOVE)

EMAIL ADDRESS: _____

HOME: _____ WORK: _____

CELL: _____ FAX: _____

SS #: _____ DL #: _____

D/O/B: _____

EMPLOYER NAME: _____

EMPLOYER ADDRESS: _____

EMPLOYER PHONE: _____

SPOUSE'S NAME: _____

ADDRESS: _____

MAILING ADDRESS: _____
(IF DIFFERENT FROM ABOVE)

EMAIL ADDRESS: _____

HOME: _____ WORK: _____

CELL: _____ FAX: _____

SS #: _____ DL #: _____

D/O/B: _____

EMPLOYER NAME: _____

EMPLOYER ADDRESS: _____

EMPLOYER PHONE: _____

DATE OF MARRIAGE: _____ STATE: _____ COUNTY: _____

DATE OF SEPARATION: _____

CHILDREN:

NAME: _____ D/O/B: _____ SS#: _____

LIVING WITH: _____ ADOPTED? _____

NAME: _____ D/O/B: _____ SS#: _____

LIVING WITH: _____ ADOPTED? _____

NAME: _____ D/O/B: _____ SS#: _____

LIVING WITH: _____ ADOPTED? _____

NAME: _____ D/O/B: _____ SS#: _____

LIVING WITH: _____ ADOPTED? _____

CLIENT VEHICLE (MAKE, MODEL, YEAR): _____

VALUE/AMOUNT OWED: _____

SPOUSE VEHICLE (MAKE, MODEL, YEAR): _____

VALUE/AMOUNT OWED: _____

MARITAL RESIDENCE:_____

In addition to the above information please provide the following:

- Verification of current income (paycheck stub or W-2 forms)
- Tax information (both parties), filing status, number of dependents
- Tax returns (both parties), the last two filed, showing income information and sources of assets
- Bank accounts, most recent statements from all checking and savings
- Deed (of any property owned)
- Employer benefit plan along with the name and number of person to contact for information
- Investments – money markets, stocks, bonds, IRA's, tax-free municipal
- Life Insurance Policies – policy's financial information and cash value
- Titles (auto, boat and motorcycle) – listing of equipment on each
- Expenses – total of past twelve months on each bill (utilities, phone water, etc.)
- Liabilities/debts (both parties)- most current statement of each (credit cards, loans, medical)
- Mortgage balances- total owed and monthly payments (please advise whether it includes taxes & insurance)