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OF COUNSEL
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PREMARITAL AGREEMENT QUESTIONNAIRE

Your Legal Name: _____

Partner's Legal Name: _____

Your Address: _____

Partner's Address: _____

Your Phone Numbers: _____

Your Email: _____

Date of Marriage: _____

History of Prior Marriages: _____

Children: _____

Your Salary/Wages: _____

Partner's Salary/Wages: _____

Partner's Attorney's Name: _____

Note: Please Attach Additional Pages If Necessary

A.) Bank Accounts, Savings Accounts, Certificates of Deposit and Money Market Accounts:

Name and type of Bank: (Savings & Loan or Credit Union)	Type of Account: (Checking, Savings, C.D., etc.)	Name on Account: (Yours, Partner's or Joint?)	Average Balance

B.) Stocks, Mutual Funds, Bonds and U.S. Savings Bonds:

Stocks					
Name of Company	Description of Security	Owner's Name (Yours, Partner's or Joint?)	Fair Market Value	Date Acquired	# of Shares or amount

Mutual Funds					
Name of Company	Name of Fund	Owner's Name (Yours, Partner's or Joint?)	Fair Market Value	Date Acquired	# of Shares or amount

Bonds and U.S. Savings Bonds					
Name of Company	Description of Security	Owner's Name (Yours, Partner's or Joint?)	Fair Market Value	Date Acquired	# of Shares or amount

C.) Real Property Owned:

Personal Residence

Address: _____

Est. Fair Market Value: _____

Legal Title (Joint?): _____

Date Acquired: _____

Balance of Mortgage(s) Owed: _____

Mortgagee: _____

Name(s) listed on Mortgage: _____

Other Real Property Owned: (Vacation, Rental, Investment, Etc.)

Address: _____

Est. Fair Market Value: _____

Legal Title (Joint?): _____

Date Acquired: _____

Balance of Mortgage(s) Owed: _____

Mortgagee: _____

Name(s) listed on Mortgage: _____

D. Business Interests:

Please describe all business interests in which you and/or your partner are involved; include proprietorships, partnerships, corporations and any buy-sell agreements and include all assets and liabilities associated with the business interest.

E. Liabilities:

Please include auto loans, personal loans, etc. but not loans against real property:

Type of liability	Amount	Secured by what asset?	Who is Obligated? (You, Parnter or Joint)	Due Date

F. Insurance:

Insurance					
Company, Address and policy number	Current cash value	Type (whole life, term, accidental, etc.)	Face Amount	Beneficiaries	Settlement options and loans, if any, which are outstanding

G. Estate Interests:

Please describe all estate interests; include expectancies:

H. Employee Benefit Plans:

Please describe all Pension Plans, Profit Sharing Plans, Employee Stock Plans, Individual Retirement Accounts, Keogh Plans or any other retirement plans maintained by you, your spouse, or either of your employers. (Attach copies of summary plan description and most recent benefit statements, if you receive one).

I. Miscellaneous Assets:

Automobiles				
Year	Make/Model	Fair Market Value	Reg. Owner	Outstanding Loan

Boats, Jetskis, Trailers, Etc.				
Year	Make/Model	Fair Market Value	Reg. Owner	Outstanding Loan

Your Furniture: _____

Partner's Furniture: _____

Your Jewelry: _____

Partner's Jewelry: _____

All other assets: (e.g. art, cash, heirlooms; include ownership and est. value)

J. Spousal Support:

Your partner's right to spousal support can be established, modified or eliminated. In addition to a periodic monetary payment, support can also include health insurance, life insurance, etc.

