



ABSOLUTE LAW GROUP

BUSINESS - TAX - ESTATE PLANNING

CLIENT QUESTIONNAIRE

1. Answer all questions completely. If you need more space, please use additional paper and attach it to this questionnaire.

2. If a particular question does not apply, enter "n/a".

3. **CONFIDENTIALITY:** The information you enter in this questionnaire is confidential and protected by Attorney-Client Privilege. The information will not be disclosed to anyone outside of this office, except in the course of rendering legal services on your behalf or as otherwise provided by law.

Date: _____

A. CLIENT INFORMATION:

Name: _____ Soc. Sec. No.: _____

Home Address: _____

City: _____ State: _____ Zip Code: _____

County: _____ Gender: _____ Male _____ Female

DOB: _____ State of Birth: _____

Home Phone: _____ Work Phone: _____ Facsimile Number: _____

E-mail Address: _____ Driver's License Number: _____

Dates of residency at current address: _____

List any previous residences in the past five (5) years, and dates resided in each:

Employer's Name (if any): _____

Employer's Address: _____

Employer's Telephone No.: _____

Date of Employment: _____ Occupation: _____

Salary: \$ _____ weekly/biweekly/twice a month/monthly/annual (circle one)

List any other jobs held during the course of this marriage (indicate employer and annual salary):

If not currently employed, list date of last employment, name of last employer, and reason currently

unemployed: _____
Indicate any additional plans for future employment: _____

Highest level of education completed: _____

Describe any other education received such as Post-high school training/education including the name of the school or college, dates attended and degree received: _____

Describe plans you have to enroll in school or complete your education, if any: _____

What is your religious preference? _____

Do you have a Will? _____ If so, do you wish it to be reviewed? _____
(If so, please return a copy of the Will with this completed form.)

How did you hear about our office? _____

Have you retained any other attorneys on this matter prior to coming to this office? (If yes, please provide name, date retained, and reason to discontinue service.) _____

B. SPOUSE'S INFORMATION:

Name: _____ Soc. Sec. No.: _____
Home Address: _____
City: _____ State: _____ Zip Code: _____
County: _____ Gender: _____ Male _____ Female
DOB: _____ State of Birth: _____
Home Phone: _____ Work Phone: _____ Facsimile Number: _____
E-mail Address: _____ Driver's License Number: _____

Is spouse represented by counsel in this matter? _____ Yes _____ No - If yes, complete the following:
Spouse's Attorney: _____
Street Address: _____
City: _____ State: _____ Zip Code: _____
Phone Number: _____ Facsimile Number: _____

Employer's Name (if any): _____
Employer's Address: _____

Job Title: _____ Nature of Job: _____
Date of Employment: _____ Occupation: _____
Salary: \$ _____ weekly/biweekly/twice a month/monthly/annual (circle one)

List any other jobs held during the course of this marriage (indicate employer and annual salary):

If not currently employed, list date of last employment, name of last employer, and reason currently unemployed: _____

Indicate any additional plans for future employment: _____

Highest level of education completed: _____

Describe any other education received such as Post-high school training/education including the name of the school or college, dates attended and degree received: _____

Describe any plans your spouse may have to enroll in school or complete his/her education: _____

What is your spouse's religious preference? _____

C. GENERAL MARITAL HISTORY:

Date of Marriage: _____

Place of Marriage: _____

(Please provide a marriage certificate)

Are you and your spouse currently living together? _____ Yes _____ No

If not, then Date of Separation: _____

Do you have an interest in reconciliation? _____ Yes _____ No

To the best of your knowledge, does your spouse want reconciliation? _____ Yes _____ No

Describe the circumstances that caused your separation: _____

If a suit for divorce has been previously filed by either spouse as to this marriage, please provide the date such was filed, the name of the primary attorney involved, the name or location of the court, and the reason the divorce was not finalized: _____

D. CHILDREN'S INFORMATION (from this marriage):

Name:	SSNo.:	Place of Birth:	Date of Birth:	Living With:	Sex:
					M / F
					M / F
					M / F
					M / F
					M / F
					M / F

Are you currently pregnant? ____ No ____ Yes; date child is due: _____

Is your spouse currently pregnant? ____ No ____ Yes; date child is due: _____

UCCJEA Information:

If any of the children have resided with anyone other than you and your spouse during the last five (5) years, please complete the following information:

Name of Custodian:	Address:	Dates Resided with:

Have you participated as a party, witness or any other capacity in other litigation or custody proceedings, including divorce, separate maintenance, child neglect, dependency or guardianship, concerning custody or visitation of any child subject to this proceeding? ____ No ____ Yes - If Yes, please describe: _____

Do you have any information of any custody or visitation proceeding currently pending in a court of this or any other state concerning any child subject to this proceeding _____ No _____ Yes - If Yes, please describe: _____

Do you have any knowledge of any support order issued by a court of this or any other state concerning any child subject to this proceeding? _____ No _____ Yes - If Yes, please describe: _____

Other Information:

Do you anticipate a dispute about the parenting plan (if so, please explain)? _____

Who should have primary parental responsibility of the children, and why? _____

Are any children adopted? _____

Are any other children of prior marriages or other dependents living in your residence? _____

Indicate if your, or your spouse's, career or education has been interrupted due to child rearing: _____

Are any of the children in private school (if yes, indicate the cost of the private school, how such cost has been paid, if you and your spouse both agree on the private school, any special reasons why the child needs private schooling, and if you desire to continue the child in the private school, your belief as to why it is in such child's best interest and the expected impact on the child's life if private school is not continued)? _____

Describe children's involvement in school activities: _____

Describe the physical and mental health of the children: _____

Indicate if any child is being treated for any medical or psychological conditions (if so, indicate the name of the treating physician or counselor, the frequency of medical or psychological treatment, any medications prescribed, cost of medical or physiological care and medicines, portion of expense not covered by insurance, and the length of time you feel treatment will be necessary): _____

Describe the parties' understanding regarding your employment during marriage: _____

Describe the parties' understanding regarding your spouse's employment during marriage: _____

Indicate if any child of the parties has separate assets or income, including trust or estate assets: _____

Indicate if any child of the parties has any special needs: _____

Describe the involvement of the other parent in the children's activities since separation: _____

Do you feel your spouse's contact with the children should be limited (if so, please explain)? _____

Do the children receive religious training (if so, indicate if there is any primary influence by you or your spouse in the religious training of the children)? _____

Are the children more likely to turn to you or to your spouse when they have problems? _____

Describe your working hours (i.e., when you leave for work and arrive home, if your hours are flexible, if your work requires travel, and if so, the frequency of such travel, time involved and distance): _____

Describe your spouse's working hours (i.e., when your spouse leaves for work and arrives home, if your spouse's hours are flexible, if your spouse's work requires travel, and if so, the frequency of such travel, time involved and distance): _____

What are your plans for child care? _____

What are your spouse's plans for child care? _____

Describe your housing arrangements, including number of bedrooms? _____

Describe your spouse's housing arrangements, including number of bedrooms? _____

PARENTAL RESPONSIBILITIES: Indicate whether you, your spouse, and/or another person currently take or have taken responsibility for the various duties regarding the children. You may check more than one box for a particular item if two or more persons apply.

	You	Spouse	Other	N/A
Helped children put on clothes	_____	_____	_____	_____
Gave children baths	_____	_____	_____	_____
Took care of children during the day	_____	_____	_____	_____
Put children to bed at night	_____	_____	_____	_____
Prepared food for children	_____	_____	_____	_____
Made medical/dental appointments for children	_____	_____	_____	_____
Took children to the doctor/dentist	_____	_____	_____	_____
Took care of children when sick	_____	_____	_____	_____
Made arrangements for outside child care	_____	_____	_____	_____
Communicated with day care personnel	_____	_____	_____	_____
Took children to day care or sitters	_____	_____	_____	_____
Took children to school	_____	_____	_____	_____
Participated in children's education	_____	_____	_____	_____
Picked up children from school	_____	_____	_____	_____
Met with teachers, principal	_____	_____	_____	_____
Helped children with homework	_____	_____	_____	_____
Took children to extracurricular activities	_____	_____	_____	_____
Participated in outdoor activities with children	_____	_____	_____	_____
Organized children's time with friends	_____	_____	_____	_____
Contacted parents of children's friends	_____	_____	_____	_____
Arranged children's birthday activities	_____	_____	_____	_____
Shopped for children's clothes, shoes and other necessities	_____	_____	_____	_____
Bought gifts for the children	_____	_____	_____	_____
Taught money management to children	_____	_____	_____	_____
Took children to church	_____	_____	_____	_____
Disciplined the children	_____	_____	_____	_____

Helped the children when they have "problems" or "issues" _____

Other not listed above: _____

Other not listed above: _____

If you checked "Other" regarding any of the above, please identify each such person, and generally describe the extent of his or her involvement with the children:

Are the children in day care or with a sitter on a regular basis (if so, provide frequency, name, address and phone number of day care, or sitter)? _____

Describe any other issue pertaining to the children that you feel should be noted in reference to this case that has not been provided through previous answers: _____

PRIOR MARITAL HISTORY

A. CLIENT'S PRIOR MARRIAGES:

Name of 1st Ex-spouse: _____

How, When and Where Marriage Terminated: _____

If there were any children born from this prior marriage, please list the name of each child, the date of birth and with whom such child is currently residing:

Name of Child	Date of Birth	Currently residing with:
_____	_____	_____
_____	_____	_____

Indicate if you currently pay or receive any child support on behalf of these children? _____

Name of 2nd Ex-spouse: _____

How, When and Where Marriage Terminated: _____

If there were any children born from this prior marriage, please list the name of each child, the date of birth and with whom such child is currently residing:

Name of Child	Date of Birth	Currently residing with:
_____	_____	_____
_____	_____	_____

Indicate if you currently pay or receive any child support on behalf of these children? _____

Name of 3rd Ex-spouse: _____

How, When and Where Marriage Terminated: _____

If there were any children born from this prior marriage, please list the name of each child, the date of birth and with whom such child is currently residing:

Name of Child	Date of Birth	Currently residing with:
_____	_____	_____
_____	_____	_____

Indicate if you currently pay or receive any child support on behalf of these children? _____

B. SPOUSE'S PRIOR MARRIAGES:

Name of 1st Ex-spouse: _____

How, When and Where Marriage Terminated: _____

If there were any children born from this prior marriage, please list the name of each child, the date of birth and with whom such child is currently residing:

Name of Child	Date of Birth	Currently residing with:
_____	_____	_____
_____	_____	_____

Indicate if your spouse currently pays or receives any child support on behalf of these children? _____

Name of 2nd Ex-spouse: _____

How, When and Where Marriage Terminated: _____

If there were any children born from this prior marriage, please list the name of each child, the date of birth and with whom such child is currently residing:

Name of Child	Date of Birth	Currently residing with:
_____	_____	_____
_____	_____	_____

Indicate if your spouse currently pays or receives any child support on behalf of these children? _____

Name of 3rd Ex-spouse: _____

How, When and Where Marriage Terminated: _____

If there were any children born from this prior marriage, please list the name of each child, the date of birth and with whom such child is currently residing:

Name of Child	Date of Birth	Currently residing with:
_____	_____	_____
_____	_____	_____

Indicate if your spouse currently pays or receives any child support on behalf of these children? _____

MARITAL MISCONDUCT

From the list below, select if you or your spouse has done any of the following:

	You	Spouse
Physically abused spouse	_____	_____
Verbally abused spouse	_____	_____
Sexually abused spouse	_____	_____
Abused a child	_____	_____
Engaged in an extramarital relationship	_____	_____
Spent marital funds on an extramarital relationship	_____	_____
Tried to commit suicide	_____	_____
Has an emotional or psychiatric condition	_____	_____
Committed a crime	_____	_____
Been arrested	_____	_____
Been detained in jail	_____	_____
Abused alcohol	_____	_____
Abused prescription drugs	_____	_____
Used illegal drugs	_____	_____
Been hospitalized for alcohol and/or drugs	_____	_____
Spent marital funds for drugs or excessive alcohol	_____	_____
Been arrested for driving while intoxicated	_____	_____
Engaged in fraud	_____	_____
Gambled	_____	_____
Other illegal activities: _____	_____	_____
Destroyed property or other items	_____	_____
Hidden, wasted or dissipated assets	_____	_____
Spent beyond means, or poorly managed finances	_____	_____

Other not listed above: _____

Other not listed above: _____

Describe when and how you first learned of spouse's marital misconduct, if spouse has admitted misconduct to you, and if you are aware of the frequency of the misconduct: _____

What effect has spouse's misconduct had on you? _____

Are children aware of misconduct? If so, how has it affected children? _____

Are you, or your children, currently in counseling, or planning to begin counseling regarding the misconduct? If so, what is the cost of the counseling? _____

When marital difficulties began, did you and/or your spouse seek counseling? If so, provide the name of the marriage counselor, the duration of counseling, whether the counseling was joint or individual, and your reasons to discontinue counseling. _____

Has any spousal or child abuse been reported to a law enforcement agency? If yes, provide name of agency and date of incident and attach a copy of any police report if available. _____

STANDARD OF LIVING:

Describe the family's standard of living during the last 2 years: _____

List any memberships to social clubs, including monthly dues, average club bill in addition to monthly dues, frequency of club use, and any particular use by each family member: _____

Describe regular family vacations: _____

Describe separate adult vacations: _____

Describe frequency, and manner of entertaining others: _____

Describe use and frequency of maids or other help: _____

Describe frequency of purchasing or leasing new cars: _____

Have your children been provided with cars? _____

Describe Community activities and involvement: _____

Describe anything not mentioned above regarding your standard of living or social status you consider significant to the outcome of this case: _____

FAMILY FINANCES:

Which spouse has primary responsibility for the finances? _____

Did this responsibility shift (if so, please explain)? _____

Was income consolidated? _____

Was any income or asset treated differently (if yes, please explain)? _____

Describe the method of filing tax returns: _____

Describe any family savings plans or retirement plans: _____

Describe anything unusual or significant about the handling of family finances not mentioned above: _____

Provide any information not already requested in the preceding questions that you consider important to a fair and equitable result in your case (add additional pages, if necessary): _____

Inheritance, Gifts, & Trusts - Client

Describe any inheritance you received during the marriage (include the date acquired, how acquired, where located, style of ownership, value at time of marriage, value when inherited, value when obtained, current market value, basis of valuation, date of valuation, average annual income derived from the asset, how income from this asset has been used during the marriage and if this asset or the income from the asset has been commingled with a joint account, used to defray normal family expenses or relied upon to obtain loans or credit): _____

Describe any major gifts you received during the marriage from someone other than your spouse (include the date acquired, how acquired, where located, style of ownership, value at time of marriage, value when obtained, current market value, basis of valuation, date of valuation, average annual income derived from the asset, how income from this asset has been used during the marriage and if this asset or the income from the asset has been commingled with a joint account, used to defray normal family expenses or relied upon to obtain loans or credit): _____

Are you a party of a trust agreement or a will currently being probated? (If yes, please explain): _____

Describe any gifts you have received from your spouse during the marriage of significant economic value which are still in existence, including engagement and wedding gifts (include the purchase price and current value of each): _____

SPOUSE'S NONMARITAL ASSETS & LIABILITIES

Premarital Assets - Spouse:

List any assets that your spouse owned prior to the marriage, that were brought into the marriage: _____

Premarital liabilities - Spouse:

List any liabilities that your spouse owed prior to the marriage that were brought into the marriage, and indicate if any marital funds or assets have been used to pay for these liabilities: _____

Disposition of Assets - Spouse

During the last 3 years, or since significant marital problems first became apparent, has your spouse disposed of any assets with a value greater than \$500.00 (if yes, please explain)? _____

Inheritance, Gifts, & Trusts - Spouse

Describe any inheritance your spouse has received during the marriage (include the date acquired, how acquired, where located, style of ownership, value at time of marriage, value when inherited, value when obtained, current market value, basis of valuation, date of valuation, average annual income derived from the asset, how income from this asset has been used during the marriage and if this asset or the income from the asset has been commingled with a joint account, used to defray normal family expenses or relied upon to obtain loans or credit): _____

Describe any major gifts your spouse received during the marriage from someone other than yourself (include the date acquired, how acquired, where located, style of ownership, value at time of marriage, value when obtained, current market value, basis of valuation, date of valuation, average annual income derived from the asset, how income from this asset has been used during the marriage and if this asset or the income from the asset has been commingled with a joint account, used to defray normal family expenses or relied upon to obtain loans or credit): _____

Is your spouse a party in a trust agreement or a will currently being probated? (If yes, please explain): _____

Describe any gifts your spouse has received from you during the marriage of significant economic value which are still in existence, including engagement and wedding gifts (include the purchase price and current value of each): _____

CLIENT'S MEDICAL INFORMATION

Describe your current health condition: _____

Date of last physical examination: _____
Name, address and phone number of physician: _____

If you have any physical disabilities, please describe the nature of the disability: _____

If you have been hospitalized in the past 5 years, for each hospitalization, please describe the date you were hospitalized, the name of the hospital, the reason for hospitalization, the outcome of such hospitalization, and your treating physician:

Describe any major health problems during the marriage not requiring hospitalization: _____

Do you have any sexually transmitted disease (if so, please specify)? _____

List any medications you are currently taking on a regular basis: _____

If you are currently, or have ever been under the care of a mental health professional, please provide the name and address of the mental health professional and the dates and frequency of the therapy provided: _____

SPOUSE'S MEDICAL INFORMATION

To the best of your knowledge, describe your spouse's current health condition: _____

If known, date of spouse's last physical examination: _____

Name, address and phone number of physician: _____

If your spouse has any physical disabilities, please describe the nature of the disability: _____

If your spouse has been hospitalized in the past 5 years, for each hospitalization, please describe the date your spouse was hospitalized, the name of the hospital, the reason for hospitalization, the outcome of such hospitalization, and your spouse's treating physician: _____

Describe any major health problems during the marriage not requiring hospitalization: _____

Does your spouse have any sexually transmitted disease (if so, please specify)? _____

List any medications your spouse is currently taking on a regular basis: _____

If your spouse is currently, or has ever been under the care of a mental health professional, please provide the name and address of the mental health professional and the dates and frequency of the therapy provided: _____

LIST OF APPRAISERS AND PROFESSIONAL ADVISORS

For each professional, indicate whether such professional is an advisor on behalf of yourself, your spouse, or both, by placing a check mark on the line under the appropriate column.

Name, Address and Phone Number:	Client	Spouse
Accountant:		
_____	_____	_____

Stock Broker:		
_____	_____	_____

Insurance Agent:		
_____	_____	_____

Appraiser:		
_____	_____	_____

Family/Marriage Counselor/Psychiatrist:		
_____	_____	_____

Family Physician:		
_____	_____	_____

Family Medical Specialist:		
_____	_____	_____

Other: _____		
_____	_____	_____

Other: _____

RELIEF REQUESTED BY CLIENT

I. Children

- _____ Primary parental responsibility of the children
- _____ Sole parental responsibility of the children
- _____ Shared parental responsibility of the children
- _____ Child support - \$ _____ Monthly
- _____ Continued medical insurance
- _____ Provide for specific expenses (i.e., extracurricular activities, etc.)
- _____ Provide for disabled child
- _____ Agreement for college expenses

II. Alimony

- _____ Permanent - \$ _____ Monthly
- _____ Rehabilitative - \$ _____ Monthly
- _____ Durational - \$ _____ Monthly
- _____ Lump sum - \$ _____
- _____ Continued medical insurance

III. Distribution of Real Estate

- _____ Exclusive use of marital home
- _____ Possession of marital home until children finish High School
- _____ Title to marital home as lump sum alimony
- _____ Claim for unequal distribution of marital home
- _____ Claim of enhancement in value or appreciation of nonmarital home
- _____ Partition or sale of marital home
- _____ Exclusive use of other real estate
- _____ Title to other realty as lump sum alimony
- _____ Claim for unequal distribution of other marital realty
- _____ Claim of enhancement in value or appreciation of nonmarital realty
- _____ Partition of other realty

IV. Distribution of Personal Property

- _____ Life insurance
- _____ Exclusive use and title to contents of residence
- _____ Return of removed property
- _____ Division of joint checking/savings accounts
- _____ Return of \$ _____ joint funds removed by spouse
- _____ Exclusive use and title to _____ automobile
- _____ Stocks
- _____ Bonds
- _____ C.D. or money market account
- _____ Pension plan or retirement fund
- _____ Profit sharing plan

V. Liabilities

- _____ Mortgage payments
- _____ Charge accounts
- _____ Attorney's fees
- _____ Miscellaneous

VI. Other

- _____ Maintain confidentiality of financial information
- _____ Restoration of Maiden Name to _____
- _____
- _____
- _____

VII.

Temporary Orders

- _____ Temporary time-sharing schedule
- _____ Special provisions for upcoming holidays
- _____ Supervised time-sharing schedule
- _____ No time-sharing schedule
- _____ Restrictions on communications between parties
- _____ Prevent removal of child from state or country
- _____ Prevent passport services or surrender passport of children
- _____ Child Support \$ _____ Monthly
- _____ Health Insurance for children
- _____ Parenting plan recommendation
- _____ Psychological exam
- _____ Exclusive use of home
- _____ Other party to pay mortgage or rent - \$ _____
- _____ Other party pay utilities
- _____ Exclusive use of vehicle
- _____ Operation of business
- _____ Exclusive use of other assets
- _____ Car payment and insurance \$ _____
- _____ Payment of other liabilities
- _____ Temporary spousal support \$ _____
- _____ Health insurance
- _____ Injunction to preserve assets, freeze accounts
- _____ Limit expenditures for living expenses, business
- _____ Injunction against domestic violence
- _____ Injunction against harassment
- _____ Temporary attorney's fees