

QUESTIONNAIRE FOR PROPERTY SETTLEMENT & SEPARATION AGREEMENT

1. List the parties' full names and birthdates:

Name: \_\_\_\_\_ D.O.B. \_\_\_\_\_

Name: \_\_\_\_\_ D.O.B. \_\_\_\_\_

2. List the date of marriage: \_\_\_\_\_

3. For all children born of the marriage, list the child's name and birth date:

Name: \_\_\_\_\_ D.O.B. \_\_\_\_\_

Name: \_\_\_\_\_ D.O.B. \_\_\_\_\_

4. List the real estate in which one or both parties have an interest:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. For all transportation (automobiles, motorcycles, boats, etc.) state the following: year, make, model, date of separation fair market value, date of separation loan balance, date of separation net value, and which of the parties has possession of said transportation:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. For all bank accounts, list the following: name of institution, account number (last four numbers is fine), type of account (checking, savings, etc.), date of separation balance, current value of accounts, and by which party it is owned (if owned jointly, state so):

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\_\_\_\_\_  
\_\_\_\_\_

7. List all investments held by either or both parties, whether jointly or separately, and for each one please list the current value as of date of separation.

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8. List any and all life insurance policies for each party, including the amount of coverage, the name of the insurance company, the policy number, the date of separation value, the policy owner, and the beneficiary of the policy:

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9. List all business interests held by either party, whether separately or jointly, and name the following: name of business, type of business organization (partnership, corporation, etc.), and the amount of percentage of ownership:

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10. List all items of value, including things that may increase in value (e.g.: Professional sport PSLs, Tax Refunds, Security Deposits, Frequent Flyer Miles, Hotel Points, etc.) for each party individually and jointly:

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11. List all current amounts balances of paid time off, bonuses, retirement accounts, IRA's, 401(k), etc. for each party, including the date of separation balance:

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12. List all debt owned by the parties, both jointly and separately, and include: date of separation balance, the debtor (husband, wife, or joint), monthly payment, and if debt is secured, the collateral:

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13. List all household goods, which party shall have ownership, and an approximate value of the item or good unless the items have already been divided by mutual agreement:

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14. List each parties' income, both gross and net, and if self-employed attach last 2 years profit loss statements and balance sheets:

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15. List all benefits and insurance policy(ies), other than life insurance, carried by the parties, both separately and jointly, and for each policy list the following: name of insurance company, type of insurance, face value, monthly payment, name of insured, and the beneficiary:

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16. List any other assets not previously mentioned, along with current value, including the date of separation value and which party owns the asset, whether separately or jointly.

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17. List any other debts not previously mentioned, along with current value, including the date of separation value, which party owns the debt, whether separately or jointly, and the monthly payment (if any):

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18. List any and all collections, or collectible items, valued at \$250.00 or more:

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19. Attach copies of last 2 years tax return and last w-2, last 3-month paystubs, payoff statement for any real property or personal property secured by a loan.