PETROFF, SMITHERMAN & ASSOCIATES, LLC
FAMILY LAW ATTORNEYS

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# CLIENT INTERVIEW FORM – PRENUPTIAL AGREEMENT

At Petroff, Smitherman & Associates, we pride ourselves on giving each client a comprehensive and personalized consultation experience. This often necessitates a thorough review of the details of your case, and our attorneys wish to provide you with the best legal advice given the circumstances of your matter. Please complete as much of the below questionnaire as time allows in advance of your consultation. In the event that the questionnaire cannot be completed prior to the consultation, it can be submitted when you are ready to proceed with your case.

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## I. Client and Fiancé(e) Information

**General Information:**

| Client | Fiancé(e) |
|---|---|
| Full Legal Name ________________________________ | Full Legal Name ____________________________ |
| Home Address ______________________________ | Home Address ______________________________ |
| City, State, Zip ______________________________ | City, State, Zip ______________________________ |
| Telephone (cell) ______________________________ | Telephone (cell) ______________________________ |
| Email address ______________________________ | Email address ______________________________ |
| Social Security Number ____________________ | Social Security Number ____________________ |
| Date of Birth / Age __________________________ | Date of Birth / Age __________________________ |
| **Income:** | **Income:** |
| Employer ________________________________ | Employer ________________________________ |
| Position ________________________________ | Position ________________________________ |
| Current Gross Annual Income __________________ | Current Gross Annual Income __________________ |
| Bi-Weekly Gross Income ________________ | Bi-Weekly Gross Income ________________ |

**Prior Relationship Information:**

| Client | Fiancé(e) |
|---|---|
| How many times were you married prior to this marriage? ________ | How many times were you married prior to this marriage? ________ |
| Dates of prior marriage______________________ | Dates of prior marriage______________________ |
| Are you paying spousal support?______________ | Are you paying spousal support?______________ |
| Are you paying/receiving child support?_________ | Are you paying/receiving child support?_________ |

## II. Information Concerning The Marriage

Anticipated Date of Marriage__________________

Place of Marriage (city, state)__________________

Will Spouse be changing their name? If so, what is the name?_______________________________________________

## III. Children of Other Marriages/Relationships

Client's children and dates of birth:

______________________________________________________________________________

______________________________________________________________________________

Fiancé(e)'s children and dates of birth:

______________________________________________________________________

______________________________________________________________________

## IV. Property

### A. Client's Real Estate

Address ______________________________Present Fair Market Value ____________________

Name on Title ____________________ Purchase Price ______________________________

First Mortgage Lender ______________Balance on First Mortgage ______________Monthly Payment_______

Second Mortgage Lender______________ Balance on Second Mortgage__________Monthly Payment_______

### B. Fiancé(e)'s Real Estate

Address ______________________________Present Fair Market Value ____________________

Name on Title ____________________ Purchase Price ______________________________

First Mortgage Lender ______________Balance on First Mortgage ______________Monthly Payment_______

Second Mortgage Lender______________ Balance on Second Mortgage__________Monthly Payment_______

**C. Residence where you and your fiancé(e) will reside**:________________________________________

**D. Please list all property and debts titled to you individually and your fiancé(e) individually.**
The items listed below will retain their separate property identity during the marriage and the other spouse shall not be entitled to any growth in value of the same.

| | Category | Description (List who has possession) | Titled To | Value/Date of Value |
|---|---|---|---|---|
| | **1. Vehicles and Other Certificate of Title Property** | (Include model and year of automobiles, trucks, motorcycles, boats, motors, motor homes, etc.) | | |
| 1. | ______________ | ____________________ | ☐ You ☐ Spouse ☐ Both | $ ______________ ______________ |
| 2. | ______________ | ____________________ | ☐ You ☐ Spouse ☐ Both | $ ______________ ______________ |
| 3. | ______________ | ____________________ | ☐ You ☐ Spouse ☐ Both | $ ______________ ______________ |
| 4. | ______________ | ____________________ | ☐ You ☐ Spouse ☐ Both | $ ______________ |

| **2. Financial Accounts (Name of Bank, etc.)** | Description (Include checking, savings, CDs, POD accounts, money market accounts, etc.) | Titled To | Value/Date of Value |
|---|---|---|---|
| 1. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |
| 2. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |
| 3. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |
| 4. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |

| **3. Pensions & Retirement plans** | (Include profit-sharing, IRAs, 401k plans, etc.; Describe each type of plan) | Titled To | Value/Date of Value |
|---|---|---|---|
| 1. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |
| 2. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |

| **4. Publicly Held Stocks, Bonds, Securities & Mutual Funds** | Description | Titled To | Value/Date of Value |
|---|---|---|---|
| 1. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |
| 2. ______ | ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |

| **5. Closely Held Stocks & Other Business Interests and Name of Company** | (Type of ownership and number) | Titled To | Value/Date of Value |
|---|---|---|---|
| 1. ______ ______ | ______ ______ | ☐ You ☐ Spouse ☐ Both | $ ______ ______ |
| 2. ______ | | ☐ You | $ ______ |

| | | | |
|---|---|---|---|
| ___ | ___ | ☐ Spouse<br>☐ Both | ___ |

| **6. Furniture & Appliances** | (Estimate value of those in your possession, and value of those in your spouse's possession) | Titled To | Value/Date of Value |
|---|---|---|---|
| 1. ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Both | $ ___<br>___ |
| 2. ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Both | $ ___<br>___ |
| 3. ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Both | $ ___<br>___ |
| 4. ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Both | $ ___<br>___ |

| **7. Any Other Assets Not Listed Above** | Explanation: List any item you have not listed above that is considered an asset. | Titled To | Value/Date of Value |
|---|---|---|---|
| ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Both | $ ___<br>___ |
| ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Both | $ ___ |

| **8. Secured Debt (Mortgages, Car, etc.)** | Name of Creditor/Purpose of Debt | Account Name | Name(s) on Account | Total Debt Due | Monthly Payment |
|---|---|---|---|---|---|
| 1. ___ | ___ | ___ | ☐You<br>☐ Spouse<br>☐ Joint | $ ___ | $ ___ |
| 2. ___ | ___ | ___ | ☐You<br>☐ Spouse<br>☐ Joint | $ ___ | $ ___ |
| 3. ___ | ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Joint | $ ___ | $ ___ |
| 4. ___ | ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Joint | $ ___ | $ ___ |
| 5. ___ | ___ | ___ | ☐ You<br>☐ Spouse<br>☐ Joint | $ ___ | $ ___ |

| 9. **Unsecured Debt, including credit cards** | Name of Creditor/Purpose of Debt | Account Name | Name(s) on Account | Total Debt Due | Monthly Payment |
|---|---|---|---|---|---|
| 1. ________ | ________ | ________ | ☐ You ☐ Spouse ☐ Joint | $ ________ | $ ________ |
| 2. ________ | ________ | ________ | ☐ You ☐ Spouse ☐ Joint | $ ________ | $ ________ |
| 3. ________ | ________ | ________ | ☐ You ☐ Spouse ☐ Joint | $ ________ | $ ________ |
| 4. ________ | ________ | ________ | ☐ You ☐ Spouse ☐ Joint | $ ________ | $ ________ |
| 5. ________ | ________ | ________ | ☐ You ☐ Spouse ☐ Joint | $ ________ | $ ________ |

**V. Spousal Support**

Are you and your fiancé(e) releasing and discharging the other from any and all rights or claims of any kind as it pertains to spousal support which may in any manner arise or accrue by virtue of the marriage?__________________

**VI. Other**

Please provide any other detail or comments as it pertains to any discussions or agreements reached between you and your fiancé(e).________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

*Please review the below list of suggested items our firm will require should you choose to move forward with your matter.*

___Client and future spouse income tax returns for the last three years

___Client and future spouse pay-stubs for the last three months and most current year-end paystub

___Client and future spouse financial account statements (current statements – checking, savings, retirement, money market, investment/brokerage and other financial accounts) for the last three months

___Client and future spouse debt account statements (current statements – loans, credit cards, store cards and any other debts owed) for the last three months

___Home mortgage promissory note, related closing documentation, and most recent real estate appraisal

___ Kelly Blue Book value of current vehicles