

### **Information regarding Assets and Debts**

For the following questions, please answer to the best of your ability. If you are unsure of any information, please indicate what you do know and put a question mark for anything you are unsure of.

#### **ASSETS**

A. Do you or your spouse have any checking or savings accounts? ☐ yes ☐ no ☐ unsure

| Name of financial Institution | Type of account                                                                                                                        | Account number | Balance today | Whose name is on the account?                                                                                                                           |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|----------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | <input type="checkbox"/> checking<br><input type="checkbox"/> savings<br><input type="checkbox"/> CD<br><input type="checkbox"/> other |                |               | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|                               | <input type="checkbox"/> checking<br><input type="checkbox"/> savings<br><input type="checkbox"/> CD<br><input type="checkbox"/> other |                |               | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

|  |                                                                                                                                        |  |  |                                                                                                                                                         |
|--|----------------------------------------------------------------------------------------------------------------------------------------|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> checking<br><input type="checkbox"/> savings<br><input type="checkbox"/> CD<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> checking<br><input type="checkbox"/> savings<br><input type="checkbox"/> CD<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

B. Do you or your spouse have investment, retirement, or pension accounts? ☐ yes ☐ no ☐ unsure

| Name of financial Institution | Type of account                                                                                                                                  | Account number | Balance today | Whose name is on the account?                                                                                                                           |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|----------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | <input type="checkbox"/> retirement<br><input type="checkbox"/> pension<br><input type="checkbox"/> investment<br><input type="checkbox"/> other |                |               | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

|  |                                                                                                                                                  |  |  |                                                                                                                                                         |
|--|--------------------------------------------------------------------------------------------------------------------------------------------------|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> retirement<br><input type="checkbox"/> pension<br><input type="checkbox"/> investment<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |
|  | <input type="checkbox"/> retirement<br><input type="checkbox"/> pension<br><input type="checkbox"/> investment<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |
|  | <input type="checkbox"/> retirement<br><input type="checkbox"/> pension<br><input type="checkbox"/> investment<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |

C. Do you or your spouse have stocks or bonds that are not already listed? ☐ yes ☐ no ☐ unsure

|                               |                 |                |               |                               |
|-------------------------------|-----------------|----------------|---------------|-------------------------------|
| Name of financial Institution | Type of account | Account number | Balance today | Whose name is on the account? |
|-------------------------------|-----------------|----------------|---------------|-------------------------------|

|  |                                                                                                     |  |  |                                                                                                                                                         |
|--|-----------------------------------------------------------------------------------------------------|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |
|  | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |
|  | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |
|  | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |

D. Do you or your spouse own any real property (houses, rentals, land)? ☐ yes ☐ no ☐ unsure

| Address of the property | Value | Who is on the deed?                                                                                                                                  |
|-------------------------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         |       | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |
|                         |       | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |
|                         |       | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |

|  |  |                                                                                                                                                      |
|--|--|------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |
|--|--|------------------------------------------------------------------------------------------------------------------------------------------------------|

E. Do you or your spouse have any life insurance policies? ☐ yes ☐ no ☐ unsure

| Name of Institution | Type of policy                                                                                      | Policy number | Cash value* in the account? | Whose name is on the account?                                                                                                                           |
|---------------------|-----------------------------------------------------------------------------------------------------|---------------|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | <input type="checkbox"/> term<br><input type="checkbox"/> whole<br><input type="checkbox"/> other   |               |                             | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|                     | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |               |                             | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

|  |                                                                                                     |  |  |                                                                                                                                                         |
|--|-----------------------------------------------------------------------------------------------------|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> stocks<br><input type="checkbox"/> bonds<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

\* Term life policies do not have a cash value. The cash value is the amount you could get today if you cashed out the policy, not the payout upon death.

F. Does anyone owe you or your spouse money? ☐ yes ☐ no ☐ unsure

| Who owes you money? | How much? | What do they owe you money for? | Who do they owe the money to?                                                                                                                        |
|---------------------|-----------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     |           |                                 | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |

|  |  |  |                                                                                                                                                      |
|--|--|--|------------------------------------------------------------------------------------------------------------------------------------------------------|
|  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |
|  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other _____ |

G. Do you or your spouse own or have a share in a business? ☐ yes ☐ no ☐ unsure

| Name of business | Type of ownership                                                                                                                                          | Type of business | Value of the business | Whose owns the business                                                                                                                                 |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <input type="checkbox"/> shareholder<br><input type="checkbox"/> sole proprietor<br><input type="checkbox"/> partnership<br><input type="checkbox"/> other |                  |                       | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

|  |                                                                                                                                                            |  |  |                                                                                                                                                         |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> shareholder<br><input type="checkbox"/> sole proprietor<br><input type="checkbox"/> partnership<br><input type="checkbox"/> other |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br><hr/> |
|--|------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|

If you own a business, we will send you separate information to fill out after we receive this intake.

G. Do either of you own automobiles, campers, farm equipment, boats, trailers, or other items with a title? ☐ yes ☐ no ☐ unsure

| Year, make and model | Value? | Who drives the vehicle | Who is listed on the title |
|----------------------|--------|------------------------|----------------------------|
|                      |        |                        |                            |
|                      |        |                        |                            |
|                      |        |                        |                            |

|  |  |  |  |
|--|--|--|--|
|  |  |  |  |
|  |  |  |  |

H. Did either party bring any assets into the marriage or inherit anything during the marriage? ☐ yes ☐ no ☐ unsure

| Asset or inheritance description | When was it received | Value when received or at the time of the marriage | Has this property been commingled?                                                             |
|----------------------------------|----------------------|----------------------------------------------------|------------------------------------------------------------------------------------------------|
|                                  |                      |                                                    | <input type="checkbox"/> yes<br><input type="checkbox"/> no<br><input type="checkbox"/> unsure |
|                                  |                      |                                                    | <input type="checkbox"/> yes<br><input type="checkbox"/> no<br><input type="checkbox"/> unsure |
|                                  |                      |                                                    | <input type="checkbox"/> yes<br><input type="checkbox"/> no<br><input type="checkbox"/> unsure |

J. Is there any other personal property not previously listed that either party own which is worth \$500 or more? (personal property, jewelry, collections, guns, etc.) ☐ yes ☐ no ☐ unsure

| Type or description of property | Value | Who should receive the property? |
|---------------------------------|-------|----------------------------------|
|                                 |       |                                  |
|                                 |       |                                  |
|                                 |       |                                  |

### **Debts**

A. Do you or your spouse have any secured debt? ☐ yes ☐ no ☐ unsure

| Name of financial Institution or person to whom the amount is owed | Type of debt                                                                                                                                   | Security for debt | Account number | Amount owed | Whose name is associated with the debt?                                                                                                                 |
|--------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                    | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |                   |                |             | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|                                                                    | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |                   |                |             | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|                                                                    | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |                   |                |             | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

|  |                                                                                                                                                |  |  |  |                                                                                                                                                         |
|--|------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

|  |                                                                                                                                                |  |  |  |                                                                                                                                                         |
|--|------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |
|  | <input type="checkbox"/> mortgage<br><input type="checkbox"/> vehicle loan<br><input type="checkbox"/> other secured debt (secured with _____) |  |  |  | <input type="checkbox"/> joint<br><input type="checkbox"/> mine only<br><input type="checkbox"/> spouse only<br><input type="checkbox"/> other<br>_____ |

B. Do you or your spouse have any unsecured debt (such as credit card, student loan, etc.) ☐ yes ☐ no ☐ unsure

| Name of financial Institution or person to whom the amount is owed | Type of debt | Account number | Amount owed | List all individual listed on the account |
|--------------------------------------------------------------------|--------------|----------------|-------------|-------------------------------------------|
|                                                                    |              |                |             |                                           |



|  |                                                                                                            |  |  |  |
|--|------------------------------------------------------------------------------------------------------------|--|--|--|
|  | <input type="checkbox"/> credit card<br><input type="checkbox"/> student<br><input type="checkbox"/> other |  |  |  |
|  | <input type="checkbox"/> credit card<br><input type="checkbox"/> student<br><input type="checkbox"/> other |  |  |  |
|  | <input type="checkbox"/> credit card<br><input type="checkbox"/> student<br><input type="checkbox"/> other |  |  |  |

**Documents to provide to attorney:**

Please provide copies of the following:

1. Copies of all titles, deeds, or other proof of any assets.
2. Copies the most recent statement for all assets or debts listed.
3. Proof of value of all assets – county or other appraisals, blue book values, insurance values, etc.
4. A list dividing all personal property, including, but not limited to, the following:
  - household furnishings
  - vehicles
  - appliances
  - pets
  - books

photos

3. Division of debts, including the following information:
  - when the debt was incurred
  - what it was for
  - who incurred it
  - who should pay for it
4. Documentation of all retirement plans, 401 K plans, pension plans, IRAs, certificates of deposit or annuities, and any deferred compensation, specifically you need to provide a summary plan description if available.
5. Copies of benefit statements of any life insurance policies with cash value