

PRE-MARITAL/POST MARITAL AGREEMENT WORKSHEET

PLEASE PROVIDE THE FOLLOWING INFORMATION:

General Information

Appointment Date: _____

To complete this questionnaire, one spouse should be designated as CLIENT, the other as SPOUSE– Please answer each section as it pertains to the INDIVIDUAL, not as a couple.

INFORMATION ABOUT CLIENT

Full Legal Name: _____

Name As You Sign on Documents: _____

Address: _____

City/State/Zip: _____

Home Telephone: _____ County of Home: _____

Place of Employment: _____ Work Phone: _____

Cell Phone: _____ Email Address: _____

Birthdate: _____ Age: _____

Social Security #: _____ Sex: M F

Marital Status: _____ U.S. Citizen? Y N

Is this your first marriage? Y N

Children w/ Current/

Proposed Spouse:	Name	Date of Birth
	_____	_____
	_____	_____

Your Children from prior marriages:

_____	_____
_____	_____
_____	_____
_____	_____

Deceased Children:

_____	Descendants? Y	N
_____	Descendants? Y	N
_____	Descendants? Y	N

INFORMATION ABOUT SPOUSE/ PROPOSED SPOUSE

Full Legal Name: _____

Name As You Sign on Documents: _____

Address: _____

City/State/Zip: _____

Home Telephone: _____ County of Home: _____

Place of Employment: _____ Work Phone: _____

Cell Phone: _____ Email Address: _____

Birthdate: _____ Age: _____

Social Security #: _____ Sex: M F

Marital Status: _____ U.S. Citizen? Y N

Is this your first marriage? Y N

Children w/ Current

Proposed Spouse:	Name	Date of Birth
	_____	_____
	_____	_____

Your Children from prior marriages:

_____	_____
_____	_____
_____	_____
_____	_____

Deceased Children:

_____	Descendants? Y	N
_____	Descendants? Y	N
_____	Descendants? Y	N

GENERAL INFORMATION ABOUT COUPLE:

How Were You Referred to Heritage Law ?: _____

Who Will Be Responsible for Your Account With Us?: _____

Have you seen another attorney about this matter?_____ If yes, who?_____

OTHER CONCERNS OR COMMENTS WHICH YOU FEEL WILL BE HELPFUL IN AIDING THE ATTORNEY IN YOUR PREMARITAL/ POST MARITAL AGREEMENT:

WHAT ARE YOUR GOALS YOU WOULD LIKE TO SEE ACCOMPLISHED IN YOUR PRE-MARITAL / POST-MARITAL AGREEMENT: