## JOHNSON, LARSON & PETERSON P.A. 908 COMMERCIAL DRIVE BUFFALO, MN 55313 PHONE 763-682-4550 FAX: 763-682-4465 WEB: <u>www.jlphlaw.com</u> Client Information Questionnaire Marriage Dissolution

So that we will be able to answer your questions and handle your case in a prompt and efficient manner, it is important you attempt to answer the following questions fully and accurately. Please print your answers. If additional space is needed, please use the back of a page. If a question is not applicable, indicate that with either "N/A" or strike through the question.

The completed questionnaire will be kept confidential and will remain in our possession. Prior to commencement of your work on your dissolution, we will need a copy of the legal description to any real property, if applicable.

You will likely need to gather a significant amount of financial information including pay stubs (3 consecutive pay periods), account statements, tax returns and other financial records. Start gathering information now, making copies as you go. The more organized you are, the better.

Your Name:				
Address: Street		City	State	Zip
Future (new address) Street		City	State	Zip
Date of Birth:	_ Age:	Social Security Number:		
Length of time resident in Mini	nesota:	Any Former Names:		
Education:				
Phone: Home	Cel	l: Business: _		
Are you a U.S. citizen?	Yes	No. Is your spouse a U.S. citizen?	Yes	No
If you answered no where do	you or your	spouse currently have citizenship?		
Closest relative:Name	Address	Relationship	Phone	
Your Health:		Physician:		
Under Treatment for:				
		nfertility issues whereby you or your s	-	ve stored
Present Marriage: Date:	Ci	ity County:	State:	
Were you previously married:				

#### YOURSELF

If so, when and where was your	marriage dissolved:			
Are you receiving or paying any	money for the supp	ort of children of a f	former marriage:	
If so, receiving or paying?	Number of	f Children:	_ If so, amount:	
Are any arrearages due for supp	ort? Ai	re you receiving or p	paying maintenance to o	or from
previous spouse:	_ Receiving or payir	ıg:	_ If so, amount:	
arrearages:	_			
Do you receive public assistance	?	_ If so, What kind? _		
	SPC	DUSE		
SPOUSE NAME:				
Address:				
Street		City	State	Zip
Future (new address)Street		City	State	Zip
Date of Birth:	Age: So	•		•
Length of time resident in Minn				
Any Former Names:				
Education:				
Phone: Home			Business:	
Closest relative:				
Name	Address	Relationship	Phone	e
Spouse Health:		Physic	ian:	
Under Treatment for:				
Have you and/or your spouse genetic/reproductive/biological				
Present Marriage: Date:	City	Count	y: State	:
Were you previously married: _				
If so, when and where was your	marriage dissolved:			

Are you receiving or paying any	money for the support of	children of a former marriage:
If so, receiving or paying?		
Number of Children:	If so, amount:	Are any arrearages due for support?
Are you receiving or paying main	ntenance to or from previo	bus spouse:
Receiving or paying:	If so, amount:	Arrearages:

Do you receive public assistance? \_\_\_\_\_ If so, What kind? \_\_\_\_\_

# **CHILDREN OF THIS MARRIAGE:**

Full Name:		Birthdate:	Age:	Social Security Number
1.				
2.				
3.				
<u>4.</u>				
<u>5.</u>				
Living with:		At:		
Physical or emotional	disabilities of ch	ildren:		
Names and dates of b	irth of any childre	en of previous n	narriages:	
Name	Date of Birth		Name	Date of Birth
Name	Date of Birth		Name	Date of Birth
With whom are they	living:		Who has legal custo	ody:
Do any of these child	ren have an incon	ne:		
Are you (or your wife	e) pregnant or cou	ld you (or your	wife be pregnant)	
Are the parties in the	same home?		If not, date of sepa	ration:
Previous separations:		From	to	
Previous Court Actio	ns:	Date filed by	y attorney Dis	smissed:

Do you	consider your marital problems irreconcilable:	
	have reason to believe there will be a dispute over the custody of your minor children: Yes No	
	Vhy:	
Who is	or is likely to be your spouse's attorney:	
Do you	desire your former name restored: If so, what is your former name:	
	INCOME INFORMATION	
Husba	nd's Occupation: 1. Employment, 2. Business (Fill out either or both as applicable	
1.	Employed by:    Length of time:	
	Address: Phone	
	Occupation: Gross Salary per month: \$ Bonus:	
2.	Business: Name of Company:	
	Address: Phone:	
	Service or Product:	
	Date acquired: _ Cost of Investment: <u>\$</u> Position Held:	
	Stock Interest: _ Spouse's Interest Number of Shareholders:	
	Directors/Officers:	
Wife's	Occupation: 1. Employment, 2. Business (Fill out either or both as applicable	
1.	Employed by:    Length of time:	
	Address: Phone	
	Occupation: Gross Salary per month: \$ Bonus:	
2.	Business: Name of Company:	
	Address:     Phone:	
	Service or Product:	
	Date acquired: Cost of Investment: \$ Position Held:	
	Stock Interest: Spouse's Interest Number of Shareholders:	
	Directors/Officers:	

Are there any babysitting costs inco	urred while parents work?	
Spouse's previous work history and	l skills, including approximate d	lates:
If no answers to previous questions		is spouse capable of doing to help
support himself/herself? Do you receive or does your spouse security, unemployment compensat	e receive any financial assistanc	e from a welfare department, social
If so, from whom, for whom, and a	mount:	
Do you receive or does your spouse Veterans Administration, from a fo		
Homestead:	ASSETS	
Address:(street)	(city)	(county) (state)
Is this homestead Abstract property	or Torrens property?	
List Plat No	Parcel No. (PID)	
Legal description:		
Date purchased:	Price: \$	In name of:
Present mortgage balance: \$	Payable: \$	Per
Name and address of contract for d	eed holder:	
Your market value of property: \$	Approximate equit	y: \$
Real estate taxes/monthly: \$	Insurance/monthly \$ I	ncluded in house payment:
House payments are in arrears by:	\$ Taxes are in arre	ears by: \$
Date, type, and cost of any major in	mprovements since purchase:	

Other Real Estate:

Other Personal Assets	
Bank Accounts:	
Savings account or savings	rtificates at
Approximate balance: \$	In name of:
Checking account at	
Approximate balance: \$	In name of:
Stocks: Company name:	No. of shares:
In name of:	Value: \$
Bonds: Type	
In name of:	Value: \$
Do you or your spouse have	ny money or property held by others?
If so, give details:	
At the time of marriage, did	ou or your spouse have money or property in excess of \$1,000.00?
If so, please explain:	
	riage estate was received by you or your spouse by inheritance, gift, o nal injury claims (state by whom received, from whom, nature, and da
	of you beneficiaries under any estate now in probate (state which part e amount involved)?
Life Insurance (privately ob	ined):
Policy No.:	with
	for
	Yearly premium: \$
J	

Cash surrender or loan value: \$\_\_\_\_\_

Life Insurance (through employer):

Describe any life in	isurance you or your sp	pouse have through an e	mployer or labor union,
in the same terms as above	, if possible:		
Medical Insurance: Check	any of the following th	at are applicable:	
Medical H	losp Maj. Medical	Dental	Glasses
Provided by employer or la	bor union. Monthly co	ost to you \$	
Monthly cost to spouse: \$_		_ Purchased privately	
By whom?		Cost: \$	
If any of the above insuran	ce does not cover the e	ntire family, explain:	
Retirement Plans:			
For yourself: Name of emp	loyer providing plan:		
Percentage vested:	Amount vested:	: \$	Date of full vesting:
Amount of employer contr	ibution per pay period:		
Amount of employee contr	ibution per pay period:		
Estimated present cash value	ue: \$		
For your spouse: Name of	employer providing pla	an:	
Percentage vested:	Amount vested:	: \$	Date of full vesting:
Amount of employer contr	ibution per pay period:		
Amount of employee contr	ibution per pay period:		
Estimated present cash value	ue: \$		
Other Employee Benefits:			
Describe any other employ employer:			spouse have through an
Individual Retirement Trus	at Account:		

For yourself: Name of institution deposited with:

Amount currently on depo	osit: \$			
For your spouse: Name of	f institution deposite	d with:		
Amount currently on depo	osit: \$			
Automobiles or Other Mo	tor Vehicles:			
Husband drives: Year	Make	Model	In name of	
Security interest: \$	payable \$	per		
Wife drives: Year	Make Mo	del In nam	ne of	
Security interest: \$	payable \$	per		
List and describe, inclumotorcycles, snowmobile	s, campers, or other	motor vehicles:		
<u>Furniture</u> :				
General description:	Security inte	erest: \$	payable \$	per
Antiques:				
General description:	Security inte	erest: \$	payable \$	per
Tools and yard equipment	<u>t</u> :			
General description:	Security inte	erest: \$	payable \$	per
		DEBTS:		
Name of <u>Creditor</u>	Purpose, or <u>for</u> whom	Present <u>Balance</u>	Monthly <u>Payment</u>	Whose obligation (wife, husband, ioint)
1. 2.		\$	\$	joint)
2.		\$	\$	
3.		\$	\$	
4.		\$	\$	
5.		\$	\$	
		T	_ ¥	

	Name of <u>Creditor</u>	Purpose, or <u>for</u> whom	Present <u>Balance</u>	Monthly Payment	Whose obligation (wife, husband, joint)
6.			\$	\$	

State what credit cards you have, in whose name, and how many cards:

## SERVICE

Please give an accurate physical description of your spouse (height, weight, color of hair, color of eyes, distinctive physical characteristics, nickname, etc.). This information is necessary in order to ensure prompt service of papers on your spouse. Also attach a recent photograph of your spouse if you have one.

Give make, model, year, color, and license number of car your spouse is driving:

When and where should dissolution papers be served on your spouse?

Would your spouse be willing to come to our office to be served the dissolution papers?

### NOTE

In case our office must reach you on short notice, give the name, address, and telephone number of the person most likely to know how you can be reached: \_\_\_\_\_\_

	FUTURE ESTIMATED MC	Husband	Wife	Children
Rent m	ortgage, or contract for deed payment	\$	\$	
	axes	\$	Ψ	\$
	nsurance	\$		\$
Utilities		Ψ		Ψ
	Ieat/fuel	\$		\$
	Vater	\$		\$
	lectricity	\$		\$
	bas (if separate from heat)	\$		\$
	ipport or spousal maintenance	Ψ		Ψ
	on from former marriage	\$		\$
	naintenance: yard, repair and decorating	\$	\$	Ψ
	d household items (meals eaten out)	\$	\$	
	t of present indebtedness	\$	\$	
Automo		Ψ	Ψ	
	bas and oil	\$		\$
	Lepairs	\$		\$
	icense and insurance (monthly)	\$		\$
	nstallment payments	\$		\$
Personal		+		*
I ersona	Grooming			
	Clothing/ Laundry and dry cleaning	\$		\$
	Medical:	\$		\$
	Doctor	\$		\$
	Dental	\$		\$
	Medications	\$		\$
	Insurance:	Ψ		Ψ
	Life	\$		\$
	Medical	\$		\$
	Dental	\$		\$
	Dues: union or professional	\$		\$
	Social obligations	\$		\$
	Church or other donations	\$		\$
	Newspapers and magazines	\$		\$
	Entertainment and recreation	\$		\$
	Other:	\$		\$
	Clothing	\$		\$
	Grooming	\$		\$
	Education/Books tuition:	\$		\$
	School Activities	\$		\$
	Transportation	\$		\$
	Lunches	\$		\$
	Personal allowance	\$		\$
	Babysitting	\$		\$
Visitatio	on Expenses/Entertainment, food,	\$		\$
transpor		Ŧ		Ŧ
	L ESTIMATED MONTHLY LIVING	\$	\$	

## FUTURE ESTIMATED MONTHLY LIVING EXPENSES

#### DOCUMENTS, INSTRUMENTS, AND DATA NECESSARY FOR DISSOLUTION PROCEEDINGS

You should bring the following items with you at the time of your first interview:

1. Your paycheck stubs: from January 1 of the current year if possible; paycheck stubs for the last three months are required.

2. If you can get them, your spouse's paycheck stubs: from January 1 of the current year if possible, and at least for the last three months.

3. Copies of your joint or individual income tax returns, both state and federal, for the past two years.

4. Deeds, abstracts, and Torrens certificates showing the legal description of your homestead and any other real estate owned by you or your spouse individually or jointly.

5. Mortgage or contract for deed balance on homestead and any other real estate. Bring the last monthly mortgage payment statement if you have one.

6. All papers and documents covering the initial purchase of your homestead, including purchase agreement.

7. Tax assessor's statements on homestead and other real properties.

8. Savings passbooks and savings certificates of individual or joint accounts held by you or your spouse individually or jointly.

9. If possible, list of corporate stocks or stock certificates owned by you or your spouse individually or jointly. Also give name of broker or brokers.

10. Current life insurance policies, with statements of loans against them.

11. A list of the outstanding bills of you and your spouse, including for whom and when incurred, amount still owed, name of creditor, and original amount.

12. A copy of any pension, retirement, profit sharing, or investment program you or your spouse is involved in through employment; records of any savings account reflecting your or your spouse's Individual Retirement Account (IRA).

13. Title or registration cards to all automobiles or other motor vehicles owned by you and your spouse individually or jointly.

14. A copy of any financial statements or statements of net worth prepared by you or your spouse for the purpose of securing bank loans or for any other purpose.

15. Any other information that will help establish your net worth, your spouse's net worth, your joint net worth, your income, and your spouse's income.

16. Any U.S. social security records or documents reflecting your or your spouse's earnings and qualifications for retirement benefits.