

Property Questionnaire

Real Estate

Family Home

Do you lease a home or apartment? _____

If YES, how much time is left on the lease? _____

Do you own your own home? _____

If YES, what is the address? _____

When was it purchased? _____

Was this before or during the marriage? _____

Whose money was used for the down payment?

Whose name(s) is on the deed?

How much was the down payment? \$ _____

What was the original purchase price? \$ _____

What is the present market value? \$ _____

How much is left unpaid on the mortgage? \$ _____

What is the equity (market value minus mortgage balance)? \$ _____

How much is the monthly mortgage payment? \$ _____

How much are the taxes? \$ _____

How much is the homeowner's insurance? \$ _____

Have there been any major improvements made since its purchase? _____

If YES, please describe when and what improvements were made:

What was the total cost? \$ _____

Whose money was used?

List the actual legal description of the home here (taken directly off the deed or mortgage):

Other Real Estate

What is the address?

When was it purchased? _____

Was this before or during the marriage? _____

Whose money was used for the down payment? _____

Whose name(s) is on the deed?

How much was the down payment? \$ _____

What was the original purchase price? \$ _____

What is the present market value? \$ _____

How much is left unpaid on the mortgage? \$ _____

What is the equity (market value minus mortgage balance)? \$ _____

How much is the monthly mortgage payment? \$ _____

How much are the taxes? \$ _____

How much is the insurance? \$ _____

Is there any rental income? \$ _____

Have there been any major improvements made since its purchase? _____

If YES, please describe when and what improvements were made:

What was the total cost? \$ _____

Whose money was used?

List the actual legal description of the home here (taken directly off the deed or mortgage):

Other Real Estate

What is the address?

When was it purchased? _____

Was this before or during the marriage? _____

Whose money was used for the down payment? _____

Whose name(s) is on the deed?

How much was the down payment? \$ _____

What was the original purchase price? \$ _____

What is the present market value? \$ _____

How much is left unpaid on the mortgage? \$ _____

What is the equity (market value minus mortgage balance)? \$ _____

How much is the monthly mortgage payment? \$ _____

How much are the taxes? \$ _____

How much is the insurance? \$ _____

Is there any rental income? \$ _____

Have there been any major improvements made since its purchase? _____

If YES, please describe when and what improvements were made:

What was the total cost? \$ _____

Whose money was used?

List the actual legal description of the home here (taken directly off the deed or mortgage):

Personal Property

The term "owner" refers to the person in whose name the account, stock, bond, etc. is held. If jointly held, write "joint."

Bank Accounts

Savings Accounts

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Checking Accounts

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Certificates of Deposit

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Money Market Accounts

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Bank: _____
Account number _____
Owner: _____
Amount \$ _____

Stocks

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual dividend \$ _____
Value \$ _____

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual dividend \$ _____
Value \$ _____

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual dividend \$ _____
Value \$ _____

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual dividend \$ _____
Value \$ _____

Bonds

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual interest \$ _____
Value \$ _____

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual interest \$ _____
Value \$ _____

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual interest \$ _____
Value \$ _____

Company: _____
CUSIP number _____
Owner: _____
Number of shares: _____
Annual interest \$ _____
Value \$ _____

Names and addresses of your and your spouse's stockbrokers:

Income Tax

Did you file a joint return for the last tax year? _____
Is there a tax or refund due? _____
How much state tax or refund? \$ _____
How much federal tax or refund? \$ _____
How much local tax or refund? \$ _____

Other personal property

Car

Year: _____

Make and model: _____

Who has possession? _____

Whose name is on title? _____

License plate number and state of registration: _____

Payment \$ _____

Amount of car loan unpaid \$ _____

Value \$ _____

Car

Year: _____

Make and model: _____

Who has possession? _____

Whose name is on title? _____

License plate number and state of registration: _____

Payment \$ _____

Amount of car loan unpaid \$ _____

Value \$ _____

Other vehicles (boats, campers, motorcycles, etc.)

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Music system

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Jewelry

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Tools

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Sporting Goods

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Furniture

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Appliances

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Other property

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Describe:

Who has possession? _____

Value \$ _____

Business Assets (Corporations, Partnerships, Proprietorships)

Description: _____

Location:

Who has ownership? _____

Value \$ _____

Description: _____

Location:

Who has ownership? _____

Value \$ _____

Description: _____

Location: _____

Who has ownership? _____

Value \$ _____

Retirement/Pension/Profit-sharing/Stock Option Plans

IRA Accounts

Bank or broker: _____

Account number _____

Owner: _____

Amount \$ _____

Bank or broker: _____

Account number _____

Owner: _____

Amount \$ _____

Bank or broker: _____

Account number _____

Owner: _____

Amount \$ _____

Retirement Funds

Company: _____

Account number _____

Whose fund? _____

Value \$ _____

Company: _____

Account number _____

Whose fund? _____

Value \$ _____

Profit-sharing Plan

Company: _____

Account number _____

Whose fund? _____

Value \$ _____

Company: _____
Account number _____
Whose fund? _____
Value \$ _____

Stock Option Plan

Company: _____
Account number _____
Whose fund? _____
Value \$ _____

Company: _____
Account number _____
Whose fund? _____
Value \$ _____

Pension Plan

Company: _____
Account number _____
Whose fund? _____
Value \$ _____

Company: _____
Account number _____
Whose fund? _____
Value \$ _____

Insurance

Life Insurance

Company: _____
On whose life: _____
Beneficiary: _____
Premium \$ _____
Cash value \$ _____

Company: _____
On whose life: _____
Beneficiary: _____
Premium \$ _____
Cash value \$ _____

(On children) Company: _____

On whose life: _____

Beneficiary: _____

Premium \$ _____

Cash value \$ _____

Medical Insurance

Company: _____

On whom: _____

Amount \$ _____

Premium \$ _____

Company: _____

On whom: _____

Amount \$ _____

Premium \$ _____

(On children) Company: _____

On whom: _____

Amount \$ _____

Premium \$ _____

Disability Insurance

Company: _____

On whom: _____

Amount \$ _____

Premium \$ _____

Company: _____

On whom: _____

Amount \$ _____

Premium \$ _____

Auto Insurance

Company: _____

Which car? _____

Amount \$ _____

Premium \$ _____

Company: _____

Which car? _____

Amount \$ _____

Premium \$ _____

Homeowner's Insurance

Company: _____

Property address: _____

Amount \$ _____

Premium \$ _____

Other Insurance

Company: _____

What purpose? _____

Amount \$ _____

Premium \$ _____

Company: _____

What purpose? _____

Amount \$ _____

Premium \$ _____

Separate Property

The term "separate property" generally refers to the property that each spouse held individually prior to the marriage and any property acquired individually by each spouse by gift or inheritance.

Was the amount of separate personal property that you or your spouse owned at the time of your marriage valued at over \$1,000.00? _____

If YES, list all specific property owned prior to marriage that is still owned (note who owns each item and its value). List property here even if listed previously:

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Was any of your property or your spouse's received by gift or inheritance? _____

If YES, list all specific property received by gift or inheritance that is still owned (note who owns each item and its value). List property here even if it is listed previously:

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____

Value \$ _____

Describe:

Owner: _____
Value \$ _____

Describe:

Owner: _____
Value \$ _____

Describe:

Owner: _____
Value \$ _____

Describe:

Owner: _____
Value \$ _____

Bills and Debts

Credit Cards

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Other Debts

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Name of company: _____

Reason for debt: _____

In whose name: _____

Monthly payment \$ _____

Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

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Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

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Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____

Name of company: _____
Reason for debt: _____
In whose name: _____
Monthly payment \$ _____
Balance due \$ _____