



INITIAL INTERVIEW FACT SHEET QUESTIONNAIRE

(Family Matter)

I. INFORMATION ABOUT YOUR SPOUSE	
Date:	
Name:	
Home Address	
Mailing Address	
Client's Date & Place of Birth	
Telephone/Mobile/ Email:	
Client's SSN#	
Spouse Name	
Home Address	
Spouse's Date & Place of Birth	
Marriage Place & Date	
Spouse's SSN#	
Client Previously Married	<input type="checkbox"/> Yes <input type="checkbox"/> No How Terminated: <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced State: _____ Children from prior relationships: _____ _____
Spouse	<input type="checkbox"/> Yes <input type="checkbox"/> No How Terminated: <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced State: _____

		Children from prior relationships: _____ _____		
Date of Separation (mm/dd/yyyy)				
Residency:				
Children's Information (if any):				
Full Name	Birth Date (mm/dd/yyyy)	Living With	Medical Problem	School & Year
Insurance Information (Please provide info or IDs If any):				
Auto Insurance:				
Health Insurance:				
Real Estate Insurance:				
Life Insurance:				

II. CLIENT'S EMPLOYMENT			
Name of Employer			
Employer's Address:			
Telephone:			
Job Title		Employed Since (mm/dd/yyyy)	
Compensation Prior & This Yr: \$			
Basis (Salary, Bonus, Commission, etc)			
Prerequisites:			
Prior Employment Information			
Spouse's Employment Information			
Name & Address of Employer (if known)			

Job Title:
Employed Since
Compensation
Prior & This year (If known):
Basis (Salary, Bonus, Commission, etc)
Prerequisites:
Prior Employment Information
Assets:
Principal Residence
Address
Date Acquired & Price
1st Mortgage
Other Loans
Source of Funds to acquire

III. Bank Accounts, CDs, Money Market Funds, etc.		
Securities		
Life Insurance Cash Value		
Personal Effects, Furniture, Autos Collections etc.		
Pensions/Profit Sharing – Deferred Comp – Keoghs – IRAs		
Businesses		
Other		

IV. ADDITIONAL INFORMATION

PARENTING TIME:

Is Removal an Issue?

Client's Story:

Causes of Action:

Advice Given:

Premarital Agreement:

Resumption of Prior Name:

Additional Information:

Adversary Information (If Known):

Prejudgment **Post judgment** **Appeal** **Domestic Violence** **Other**

Referred By:

Retainer/Fee Arrangement:

Originating Attorney:

Billing Attorney:

Attorney Notes: