

QUATTRINI LAW, PLLC
MATRIMONIAL INTAKE QUESTIONNAIRE

INSTRUCTIONS: PLEASE FILL OUT THE FOLLOWING INFORMATION TO THE BEST OF YOUR ABILITY. THE MORE COMPLETE YOUR FORM IS, THE MORE EFFICIENT OUR RETAINER APPOINTMENT WILL BE. SOME ITEMS WILL NOT APPLY TO YOU.

1. Plaintiff's Full Name: _____
Address: _____
Phone: _____
Employer's Name and Address: _____

2. Defendant's Full Name: _____
Address: _____
Phone: _____
Employer's Name and Address: _____

3. Date of Marriage: _____
City/Town/Village, State, and County of Marriage _____

Religious or Civil Ceremony: _____

4. Children born to you and your spouse:

<u>Name</u>	<u>Age</u>	<u>Date of Birth</u>	<u>Social Security</u>
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5. List **ALL** addresses where the children have lived for the past 5 years and the month and year in which they lived there. Please start with the most recent address and work backward:

6. Length of your residence in NYS: _____

7. Date of Separation from your spouse: _____

8. Did either of you leave the marital home? Why?

9. Has there been any domestic violence? _____

10. Is your spouse currently in the military? If so, which branch? _____

11. Are there any previous or current divorce actions pending between you and your spouse? _____

12. PERSONAL PROPERTY

- a. Please list all property purchased or given to you BEFORE you were married. Please list property or money gifted to you, received from inheritance, or received from a personal injury award either BEFORE OR DURING the marriage:

- b. Please list all personal property acquired during your marriage that is still in existence, in YOUR possession, and not already listed above, regardless of whether you and your spouse have already divided this property:

- c. Please list all personal property acquired during your marriage that is still in existence, in YOUR SPOUSE'S possession, and not already listed above, regardless of whether you and your spouse have already divided this property:

- d. Have you purchased anything since you separated from your spouse?
Has he/she purchased anything since the separation?:

13. REAL PROPERTY

- a. List every parcel of real property purchased during the marriage, whether held jointly or separately. Please include the following:
 - i. full address

- ii. date of purchase
- iii. source of funds to purchase
- iv. purchase price
- v. down payment amount
- vi. source of funds for down payment
- vii. current fair market value
- viii. name(s) appearing on deed and/or mortgage
- ix. any home improvements for which money is still owed

**** PLEASE ATTACH COPIES OF DEED AND MORTGAGE****

14. PENSIONS OR RETIREMENT PLANS

- a. List any pension or 401(k)/403(b) plan in YOUR name:
 - i. Employer: _____
 - ii. Type of plan: _____
 - iii. Length of employment: _____
 - iv. Current value: _____

- b. List any pension or 401(k)/403(b) plan in YOUR SPOUSE'S name:
 - i. Employer: _____
 - ii. Type of plan: _____
 - iii. Length of employment: _____
 - iv. Current value: _____

15. MARITAL DEBTS

- a. List all debts that are in you AND your spouse's names:
 - i. Creditor: _____
 Amount of Current Debt: _____
 Who should be responsible for this debt and why?

 - ii. Creditor: _____

Amount of Current Debt: _____
Who should be responsible for this debt and why?

iii. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

iv. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

v. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

b. List all debts that are in YOUR NAME ONLY:

i. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

ii. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

iii. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

iv. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

v. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

c. List all debts that are in **YOUR SPOUSE'S NAME ONLY**:

i. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

ii. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

iii. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

iv. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

v. Creditor: _____
Amount of Current Debt: _____
Who should be responsible for this debt and why?

PLEASE ATTACH A SEPARATE SHEET IF YOU NEED MORE ROOM

16. INCOME

- a. Your income at the date of marriage
 - i. Employer: _____
 - ii. Position: _____
 - iii. Gross earnings: _____
 - iv. Length of employment: _____

- b. Your present income:
 - i. Employer: _____
 - ii. Position: _____
 - iii. Gross earnings: _____
 - iv. Length of employment: _____

- c. Your spouse's income at the date of marriage:
 - i. Employer: _____
 - ii. Position: _____
 - iii. Gross earnings: _____
 - iv. Length of employment: _____

- d. Your spouse's present income:
 - i. Employer: _____
 - ii. Position: _____
 - iii. Gross earnings: _____
 - iv. Length of employment: _____

- e. Do you receive benefits from any of the following? Please state monthly amount:
 - i. Cash assistance: _____
 - ii. Social Security: _____
 - iii. Supplemental Security Income (SSI): _____
 - iv. Worker's Compensation: _____
 - v. NYS Disability: _____
 - vi. Unemployment: _____
 - vii. Private insurance: _____
 - viii. Pension: _____

f. Does your spouse receive benefits from any of the following? Please state monthly amount:

- i. Cash assistance: _____
- ii. Social Security: _____
- iii. Supplemental Security Income (SSI): _____
- iv. Worker's Compensation: _____
- v. NYS Disability: _____
- vi. Unemployment: _____
- vii. Private insurance: _____
- viii. Pension: _____

g. Number of years married to current spouse: _____

h. Is there a significant loss to you from your spouse's:

- i. Estate or inheritance? _____
- ii. Bank accounts? _____
- iii. Personal property? _____
- iv. Real property? _____

i. Is there any property in your spouse's possession that you want to have? Please explain.

17. MAINTENANCE

a. Do you want maintenance from your spouse? _____

b. What types of jobs have you held?

c. What type of education/training have you received?

d. What type of job do you anticipate having in the future?

e. What types of jobs has your spouse held?

f. What type of education/training has your spouse received?

g. What type of job does your spouse anticipate having in the future?

h. Are you currently self supporting? _____. If not, how long do you think it would take to become so? _____

i. In order for your spouse to pursue schooling/career, did you forgo pursuing schooling/career? Please explain.

j. Future financial circumstances

- i. Do you plan to go to school? _____
- ii. Do you plan to seek employment? _____
- iii. Do you plan to change employment _____

- k. Wasteful dissipation of assets
 - i. Did your spouse waste any marital money or property through drug or alcohol abuse, extramarital affairs, gambling, or anything similar? Please explain.

- l. Has your spouse given away or placed a debt upon any marital property? Please explain.

18. CHILD SUPPORT

- a. How much money do you spend annually on child care? _____
- b. How much do you spend annually on out of pocket medical expenses for the children? _____
- c. How much money do you spend annually on the children's education?
- d. Is there a current child support order in place for the benefit of the children? Please provide me with a copy from the family court clerk's office. _____
- e. Have you received any child support from your spouse since your separation? How much? _____
- f. Do you or your spouse have life insurance?
- g. What type of health insurance do you, your spouse, and the children have?

19. CUSTODY AND VISITATION

- a. Do you want to be responsible for all major decisions involving the children, or do you want to share this responsibility with your spouse?

- b. Is there a current Order of Custody and Visitation in place? If yes, do you think it needs to be changed? Please provide me with a copy.

- c. What does your ideal visitation schedule look like?

- d. If you feel there is a compelling reason for your spouse to not have visitation, please explain:

**THE FOLLOWING INFORMATION IS REQUIRED FOR THE CERTIFICATE OF
DISSOLUTION:**

	PLAINTIFF	DEFENDANT
STATE OF BIRTH		
DATE OF BIRTH		
SOCIAL SECURITY NO.		
RACE		
NUMBER OF PREVIOUS MARRIAGES		
HOW PREVIOUS MARRIAGES WERE DISSOLVED (death, divorce)		
EDUCATION LEVEL COMPLETED		

DATE OF SEPARATION: _____

MAIDEN NAME: _____

GROUND(S) FOR DIVORCE (Cruel & Inhumane Treatment; Abandonment; No Fault; Other):
