



Please send completed questionnaire to:
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 Main Number: 650.368.4662
 General Fax: 650.367.8531

FAMILY LAW QUESTIONNAIRE

Please complete this form and return to the address listed above. For optimum accuracy, please type or print clearly.

I. PERSONAL INFORMATION			
A	NAME (LAST)	FIRST	MI
STREET ADDRESS		CITY	STATE ZIP CODE
HOME TELEPHONE		WORK/ALTERNATE TELEPHONE	EMAIL
SOCIAL SECURITY NUMBER		BIRTH DATE / /	AGE
B	SPOUSE/DOMESTIC PARTNER (LAST)	FIRST	MI
STREET ADDRESS		CITY	STATE ZIP CODE
HOME TELEPHONE		WORK/ALTERNATE TELEPHONE	EMAIL
SOCIAL SECURITY NUMBER		BIRTH DATE / /	AGE
C	HAVE YOU BEEN A RESIDENT OF CALIFORNIA FOR THE LAST SIX MONTHS AND A RESIDENT OF YOUR CURRENT COUNTY FOR THE LAST THREE MONTHS? <input type="checkbox"/> YES <input type="checkbox"/> NO IF NO PLEASE STATE YOUR PLACE OF RESIDENCE FOR THE LAST SIX MONTHS.		
D	HAVE ANY OF THE CHILDREN LIVED OUTSIDE OF THE STATE OF CALIFORNIA DURING THE LAST FIVE (5) YEARS? <input type="checkbox"/> YES <input type="checkbox"/> NO		
E	HAVE THE CHILDREN LIVED WITH ANY PERSON OTHER THAN YOU AND/OR YOUR SPOUSE? <input type="checkbox"/> YES <input type="checkbox"/> NO PLEASE LIST NAME OF PERSON WITH WHOM THE CHILDREN LIVED WITH AND DATES.		
F	ARE THERE ANY OTHER PENDING LEGAL PROCEEDINGS CONCERNING THE CHILDREN? <input type="checkbox"/> YES <input type="checkbox"/> NO		
G	PLEASE ENTER THE FOLLOWING INFORMATION FOR YOUR CHILD(REN)		
NAME	BIRTH DATE / /	SEX	
	/ /		
	/ /		
	/ /		

I. PERSONAL INFORMATION (CONTINUED)

H	ARE ANY OF THESE CHILDREN FROM A PRIOR MARRIAGE? <input type="checkbox"/> YES <input type="checkbox"/> NO		
I	PLEASE ENTER THE FOLLOWING INFORMATION ABOUT THIS PREVIOUS MARRIAGE		
	PLACE OF MARRIAGE	DATE OF MARRIAGE / /	DATE OF SEPARATION / /
J	LEVEL OF EDUCATION	YOU	SPOUSE
K	DURING YOUR MARRIAGE HAVE EITHER YOU AND/OR YOUR SPOUSE EXECUTED WILLS, INCLUDING RECIPROCAL OR COMPANION WILL, OR A TRUST? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, PLEASE ANSWER THE FOLLOWING.		
	NAME OF ATTORNEY WHO DRAFTED WILL	DATE OF WILL	LOCATION OF ORIGINAL WILL OR COPIES
	BRIEF SUMMARY OF ANY STATEMENTS, AGREEMENTS, DECLARATIONS, OR CONSENTS CONTAINED IN THE WILLS REGARDING THE STATUS OF COMMUNITY OR SEPARATE PROPERTY		

II. PROPERTY

PLEASE PROVIDE THE INFORMATION REQUESTED BELOW TO THE BEST OF YOUR ABILITY. PLEASE DO NOT BE LIMITED BY THE SPACE BELOW IN SUPPLYING US WITH THE INFORMATION CONCERNING YOUR ASSETS. USE SEPARATE PAPER WHEN NECESSARY.

A	FAMILY RESIDENCE			
	STREET ADDRESS	CITY	STATE	ZIP CODE
	FORM OF TITLE WHEN ACQUIRED			
	ANY CHANGE SINCE ACQUISITION? <input type="checkbox"/> YES <input type="checkbox"/> NO IF, YES, PLEASE DESCRIBE CHANGE AND ENTER DATE WHEN CHANGE WAS MADE.			
	DATE OF PURCHASE/ACQUISITION / /	PURCHASE PRICE \$	DOWN PAYMENT \$	
	AMOUNT BORROWED AT TIME OF PURCHASE \$	NAME OF LENDER(S)		
	LOAN BALANCE(S) SINCE DATE OF SEPARATION \$	PRESENT LOAN BALANCE(S) \$	MONTHLY PAYMENT \$	
	SOURCE OF FUNDS FOR PURCHASE/ACQUISITION (INCLUDING DOWN PAYMENT)			
	SOURCE OF FUNDS FOR MORTGAGE PAYMENTS DURING MARRIAGE			
	SOURCE OF FUNDS FOR MORTGAGE PAYMENTS SINCE SEPARATION			
	HAVE YOU OR YOUR SPOUSE EVER USED A LIFETIME EXEMPTION FOR THE SALE OF A RESIDENCE? <input type="checkbox"/> YES <input type="checkbox"/> NO			

II. PROPERTY (CONTINUED)

SOURCE OF FUNDS FOR DOWN PAYMENT

SOURCE OF FUNDS FOR MONTHLY PAYMENTS DURING MARRIAGE

SOURCE OF FUNDS FOR MONTHLY PAYMENT (INCLUDING DOWN PAYMENT)

FINANCING INFORMATION (CREDITOR, BALANCE, ETC.)

IF ANY OF THE ITEMS DESCRIBED IN II.C, D, AND E ABOVE ARE NOT CURRENTLY AT THE FAMILY RESIDENCE, PLEASE INDICATE WHERE THEY ARE AND IN WHOSE POSSESSION.

WERE ANY OF THE ITEMS DESCRIBED IN II.C, D, AND E ABOVE ACQUIRED BY GIFT OR INHERITANCE OR OWNED BEFORE MARRIAGE? YES NO
IF YES, INDICATE ITEMS AND BY WHICH SPOUSE THEY WERE ACQUIRED OR OWNED.

F

LIFE INSURANCE POLICIES FOR EACH FAMILY MEMBER

	POLICY 1	POLICY 2	POLICY 3
TYPE OF INSURANCE			
NAME OF INSURED			
NAME OF COMPANY			
POLICY NUMBER			
OWNER OF POLICY			
FACE AMOUNT	\$	\$	\$
BENEFICIARY			
CASH SURRENDER VALUE	\$	\$	\$
ACQUISITION DATE	/ /	/ /	/ /
LOANS/BALANCES	\$	\$	\$

II. PROPERTY (CONTINUED)

G	BANK ACCOUNTS AND CERTIFICATES OF DEPOSIT		
	BANK/CERTIFICATE 1	BANK/CERTIFICATE 2	BANK/CERTIFICATE 3
TYPE (CHECKING, SAVINGS, CD, TRUST, OTHER)			
NAME ON ACCOUNT			
NAME OF INSTITUTION			
ADDRESS			
DATE OPENED	/ /	/ /	/ /
BALANCE ON DATE OF SEPARATION			
PRESENT BALANCE	\$	\$	\$
SOURCE OF FUNDS			
H	SAFE-DEPOSIT BOXES: NAME OF INSTITUTION		
STREET ADDRESS			
CITY	STATE	ZIP CODE	BOX NUMBER
DESCRIBE CONTENTS			
NAME AND ADDRESS OF ANY OTHER PERSON HAVING ACCESS TO SAFETY DEPOSIT BOX			
I	BUSINESS INTERESTS		
<i>INDICATE NAME, NATURE OF BUSINESS, DATE STARTED, WHETHER BUSINESS IS A SOLE PROPRIETORSHIP, PARTNERSHIP, OR CORPORATION, NAMES OF OTHER OWNERS, PARTNERS, OR SHAREHOLDERS AND PERCENTAGE OF INTEREST, HOW TITLE IS HELD, AND OPTIONS TO BUY OR SELL</i>			
1.			
2.			
J	STOCKS		
<i>INDICATE NAME OF CORPORATION, TYPE (COMMON, PREFERRED, OTHER), NUMBER OF SHARE, MARKET VALUE, LOCATION OF CERTIFICATES, HOW TITLE IS HELD, COST, SOURCE OF FUNDS AND DATE ACQUIRED</i>			
1.			
2.			

II. PROPERTY (CONTINUED)

K

BONDS

INDICATE TYPE, DATE OF MATURITY, FACE AMOUNT, HOW TITLE IS HELD, SOURCE OF FUNDS AND DATE ACQUIRED

1.

2.

L

PENSION, RETIREMENT, PROFIT SHARING PLANS, MILITARY PENSION

INDICATE NAME OF EMPLOYER, NAME OF PARTICIPANT, VESTED INTEREST, ESTIMATED VALUE OF INTEREST, DATE STARTED

1.

2.

M

I.R.A. ACCOUNTS

	ACCOUNT 1	ACCOUNT 2	ACCOUNT 3
TYPE OF ACCOUNT			
NAME ON ACCOUNT			
NAME OF INSTITUTION			
ADDRESS OF INSTITUTION			
ACCOUNT NUMBER			
DATE OPENED	/ /	/ /	/ /
VALUE ON DATE OF SEPARATION	\$	\$	\$
PRESENT VALUE	\$	\$	\$
SOURCE OF FUNDS			

N

DO YOU OR YOUR SPOUSE HAVE ANY EXPECTED INHERITANCES? YES NO IF YES, PLEASE EXPLAIN.

II. PROPERTY (CONTINUED)

O

DESCRIBE ANY PROPERTY YOU OR YOUR SPOUSE RECEIVED FOR PERSONAL INJURIES AND THE DATE RECEIVED.

P

ARE YOU PRESENTLY, OR DO YOU ANTICIPATE BEING, A PLAINTIFF, DEFENDANT OR OTHER PARTY TO ANY TYPE OF LAWSUIT OR LITIGATION?
 YES NO IF YES, PLEASE SPECIFY.

Q

HAVE YOU OR YOUR SPOUSE AT ANY TIME ENTERED INTO ANY AGREEMENTS OR UNDERSTANDINGS REGARDING PROPERTY, SUPPORT OR CHILDREN? YES NO

IF YES, PLEASE GIVE THE DATE, WHETHER ORAL OR WRITTEN, LOCATION OF ORIGINALS OR COPIES, IF WRITTEN, AND A BRIEF DESCRIPTION OF THE TERMS

R

DO YOU OR YOUR SPOUSE HAVE ANY ACCOUNTS RECEIVABLES? YES NO
IF YES, INDICATE THE AMOUNT, THE NAME OF THE DEBTOR AND THE PAYMENT PROVISIONS.

S

OTHER ASSETS

1. STOCK OPTIONS

2. OIL ROYALTIES

3. INVESTMENT INTERESTS

4. CLUB MEMBERSHIPS

5. OPTION RIGHTS

6. TAX LOSS CARRY FORWARDS

7. TAX REFUNDS

8. TRUSTS (SETTLOR, TRUSTEE, BENEFICIARY, PRINCIPAL, AND INCOME)

9. COPYRIGHT OWNERSHIP (LITERARY, MUSICAL, OTHER)

10. PATENT OWNERSHIP

11. LICENSING AGREEMENTS AS LICENSOR

12. LICENSING AGREEMENTS AS LICENSEE

13. RIGHTS TO RECEIVE ROYALTIES

14. FREQUENT FLYER PREREQUISITES

15. MISCELLANEOUS

II. PROPERTY (CONTINUED)

T	ASSETS OF CHILDREN (STOCKS, BONDS, PROPERTY, ETC.) PLEASE USE ADDITIONAL SHEETS IF NECESSARY.			
		CHILD 1	CHILD 2	CHILD 3
	DESCRIPTION OF ASSET			
	OWNER			
	VALUE	\$	\$	\$
	PERSON IN POSSESSION/CONTROL			

III. OBLIGATIONS OTHER THAN INSTALLMENT PAYMENTS

INDICATE ALL PRESENTLY OUTSTANDING DEBTS AND OBLIGATIONS, INCLUDING TAX LIABILITIES, PERSONAL GUARANTIES, LAWSUITS, CONTINGENT LIABILITIES, ETC. PLEASE INCLUDE THE DATE INCURRED, PURPOSE, DATE DUE, TERMS OF REPAYMENT, CURRENT BALANCE, AND BALANCE AS OF THE DATE OF SEPARATION.

A	CREDITOR		
	CREDITOR NAME 1	AMOUNT \$	DATE DUE / /
PURPOSE FOR WHICH INCURRED			
BALANCE AT SEPARATION \$		CURRENT BALANCE \$	
CREDITOR NAME 2	AMOUNT \$	DATE DUE / /	
PURPOSE FOR WHICH INCURRED			
BALANCE AT SEPARATION \$		CURRENT BALANCE \$	
NOTE: (1) YOU SHOULD PAY PARTICULAR ATTENTION TO THE INFORMATION YOU GIVE WITH RESPECT TO DEBTS AND LIABILITIES WHEREVER SUCH INFORMATION IS CALLED FOR IN THIS FORM. SOME OR ALL OF THESE DEBTS AND LIABILITIES MAY BE ASSIGNED TO YOUR SPOUSE AS PART OF THE DIVISION OF THE COMMUNITY PURSUANT TO CIVIL CODE SECTION 4800.6; HOWEVER, IF YOUR SPOUSE SHOULD DEFAULT ON THE DEBT OF OBLIGATION SO ASSIGNED, THE CREDITOR MAY STILL HAVE A CAUSE OF ACTION AGAINST YOU. (2) INCLUDE LAWSUITS AND CONTINGENT LIABILITIES AS NECESSARY.			

IV. MISCELLANEOUS

NAME OF ACCOUNTANT			
STREET ADDRESS			
CITY	STATE	ZIP CODE	TELEPHONE
NAME OF INSURANCE BROKER			
STREET ADDRESS			
CITY	STATE	ZIP CODE	TELEPHONE
NAME OF ESTATE LAWYER			
STREET ADDRESS			
CITY	STATE	ZIP CODE	TELEPHONE

IV. MISCELLANEOUS (CONTINUED)

NAME OF BUSINESS LAWYER

STREET ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

NAME OF REAL ESTATE BROKER

STREET ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

NAME OF STOCK/FINANCE BROKER

STREET ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

NAME OF DOCTOR/PSYCHIATRIST

STREET ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

V. INCOME

A

NAME OF YOUR EMPLOYER

YOUR OCCUPATION

STREET ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

OCCUPATION

B

NAME OF SPOUSE'S EMPLOYER

SPOUSE'S OCCUPATION

STREET ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE

C

WITHHOLDING INFORMATION

OF WITHHOLDING ALLOWANCES CLAIMED

YOU

SPOUSE

MARITAL STATUS INDICATED

D

GROSS MONTHLY INCOME (PLEASE ATTACH A COPY OF MOST RECENT PAYCHECK)

YOU

SPOUSE

1. SALARY AND WAGES (INCLUDE COMMISSIONS, BONUSES, AND OVERTIME)

\$

\$

2. PENSIONS AND RETIREMENT

\$

\$

3. SOCIAL SECURITY

\$

\$

4. DISABILITY AND UNEMPLOYMENT BENEFITS

\$

\$

V. INCOME (CONTINUED)

5. PUBLIC ASSISTANCE	\$	\$
6. CHILD SUPPORT		
a. PRESENT MARRIAGE	\$	\$
b. PRIOR MARRIAGE	\$	\$
7. SPOUSAL SUPPORT		
a. PRESENT MARRIAGE	\$	\$
b. PRIOR MARRIAGE	\$	\$
8. DIVIDENDS AND INTEREST		
9. RENTS (GROSS RECEIPTS, LESS CASH EXPENSES; DO NOT INCLUDE DEPRECIATION; ATTACH SCHEDULE)	\$	\$
10. CONTRIBUTIONS TO HOUSEHOLD EXPENSES FROM OTHER SOURCES (NEW SPOUSE, LIVE-IN COMPANION, RELATIVE, ETC.)	\$	\$

E

DEDUCTIONS FROM GROSS INCOME

	YOU	SPOUSE
1. STATE INCOME TAXES	\$	\$
2. FEDERAL INCOME TAXES	\$	\$
3. SOCIAL SECURITY	\$	\$
4. STATE DISABILITY INSURANCE	\$	\$
5. MEDICAL AND OTHER INSURANCE	\$	\$
6. UNION AND OTHER DUES	\$	\$
7. RETIREMENT AND PENSION FUND	\$	\$
8. SAVINGS PLAN	\$	\$
9. OTHER DEDUCTIONS (SPECIFY)	\$	\$
a.	\$	\$
b.	\$	\$
c.	\$	\$

VI. LIQUID ASSETS

	UNDER YOUR CONTROL	UNDER SPOUSE'S CONTROL
1. CASH	\$	\$
2. CHECKING ACCOUNTS	\$	\$
3. STOCKS	\$	\$
4. BONDS	\$	\$
5. LIFE INSURANCE (CASH VALUE)	\$	\$
6. OTHER	\$	\$

VII. MONTHLY EXPENSES

PLEASE LIST YOUR MONTHLY EXPENSES AS ACCURATELY AS POSSIBLE. A REVIEW OF YOUR CHECK REGISTER, RECEIPTS AND PAID BILLS WILL HELP YOU TO ACCUMULATE THIS LIST. NOTE THAT THIS IS NOT A BUDGET, BUT THE ACTUAL AMOUNTS THAT YOU HAVE BEEN SPENDING IN RECENT MONTHS (PERHAPS PRIOR TO SEPARATION). IF YOU HAVE BEEN UNABLE TO SPEND MONEY ON CERTAIN ITEMS, E.G., CLOTHES OR ENTERTAINMENT, IN RECENT MONTHS, PLEASE INDICATE AN ESTIMATE OF THE AMOUNTS SPENT DURING YOUR MARRIAGE WHEN FUNDS WERE MORE READILY AVAILABLE TO MAKE SUCH EXPENDITURES.

IF YOUR SPOUSE IS MEETING CERTAIN OF THE BELOW EXPENSES, PLEASE INDICATE THE AMOUNT UNDER THE *SPOUSE* COLUMN. IF YOUR SPOUSE IS MEETING SUCH EXPENSE BUT YOU DO NOT KNOW THE AMOUNT, PLEASE WRITE "UNKNOWN" UNDER THE *SPOUSE* COLUMN.

WHERE POSSIBLE, ATTEMPT TO SEGREGATE THE EXPENSE BETWEEN YOU AND YOUR CHILD(REN).

A RENT AND HOUSEHOLD			
	YOU	SPOUSE	CHILD(REN)
1. RENT OR MORTGAGE PAYMENT			
2. REAL PROPERTY TAXES AND INSURANCE			
3. MAINTENANCE			
a. REPAIRS			
b. GARDENER			
c. CLEANING SERVICE			
d. POOL SERVICE			
e. OTHER			
B FOOD AND SUPPLIES			
	YOU	SPOUSE	CHILD(REN)
1. AT HOME			
2. SCHOOL LUNCHES			
3. EATING OUT			

VII. MONTHLY EXPENSES (CONTINUED)

C UTILITIES			
	YOU	SPOUSE	CHILD(REN)
1. GAS			
2. ELECTRICITY			
3. WATER			
4. GARBAGE			
5. TELEPHONES			
D LAUNDRY AND CLEANING			
	YOU	SPOUSE	CHILD(REN)
1. LAUNDRY			
2. DRY CLEANING			
E CLOTHING			
	YOU	SPOUSE	CHILD(REN)
1. YOU			
2. CHILD(REN)			
3. SHOES			
4. ALTERATIONS			
5. OTHER			
F MEDICAL AND DENTAL (EXCLUDING PORTION COVERED BY INSURANCE)			
	YOU	SPOUSE	CHILD(REN)
1. DOCTOR			
2. DENTIST			
3. ORTHODONTIST			
4. OPTOMETRIST			
5. PSYCHIATRIST/THERAPIST			
6. DRUGS			
7. OTHER			

VII. MONTHLY EXPENSES (CONTINUED)

G INSURANCE			
	YOU	SPOUSE	CHILD(REN)
1. LIFE			
2. MEDICAL HOSPITALIZATION			
3. HOMEOWNER			
4. DISABILITY			
5. PERSONAL PROPERTY			
6. OTHER			
H CHILDCARE			
	YOU	SPOUSE	CHILD(REN)
1. BABYSITTER			
2. DAY CARE			
3. ALLOWANCE			
4. CLUBS			
5. SUMMER CAMP			
6. OTHER			
I CHILD/SPOUSAL SUPPORT			
	YOU	SPOUSE	CHILD(REN)
1. PRESENT MARRIAGE – CHILD SUPPORT			
2. PRIOR MARRIAGE – CHILD SUPPORT			
3. PRESENT MARRIAGE – SPOUSAL SUPPORT			
4. PRIOR MARRIAGE – SPOUSAL SUPPORT			
5. SUMMER CAMP			
6. OTHER			

VII. MONTHLY EXPENSES (CONTINUED)

J SCHOOL			
	YOU	SPOUSE	CHILD(REN)
1. LESSONS			
2. TUTORS			
3. TUITION			
K ENTERTAINMENT AND VACATIONS			
	YOU	SPOUSE	CHILD(REN)
1. ENTERTAINMENT			
2. VACATIONS (PRORATE MONTHLY)			
L INCIDENTALS			
	YOU	SPOUSE	CHILD(REN)
1. CIGARETTES			
2. COSMETICS			
3. HAIR CARE			
4. NAIL CARE			
5. SOCIAL AND BUSINESS DUES			
6. SUBSCRIPTIONS			
7. PETS			
8. CHARITY			
9. GIFTS			
10. TV AND APPLIANCE REPAIR			
11. OTHER			
M TRANSPORTATION AND AUTO EXPENSE			
	YOU	SPOUSE	CHILD(REN)
1. GAS/OIL			
2. REPAIRS/MAINTENANCE			
3. LICENSE			

