

# T.J. HEINEMANN, P.A.

## PRENUPTIAL/POSTNUPTIAL AGREEMENT QUESTIONNAIRE

**Note: This information must be as complete and accurate as possible so we can properly draft your prenuptial or postnuptial agreement. All information disclosed herein will be maintained in strict confidence. If you cannot answer a certain question, circle it to indicate that it is applicable and we can get the details later if necessary.**

**PERSONAL INFORMATION**

**DATE:**

1. Date of Marriage, if known		
2. Your Name (First, Middle, Last)	Your Date of Birth	
3. Your Home Address (Number, Street)	City	State Zip
4. Your Mailing Address If Different From Above	City	State Zip
5. Your Home Phone (    )	Your Cell Phone (    )	Your Email Address
6. Future Spouse's Name (First, Middle, Last)	Future Spouse's Date of Birth	
7. Future Spouse's Home Address (Number, Street)	City	State Zip
8. Future Spouse's Mailing Address If Different From Above	City	State Zip
9. Future Spouse's Cell Phone (    )	Future Spouse's Email Address	Future Spouse's Attorney/Tel.

Circle or fill in your answers (attach sheets or use the back if necessary to clarify)	You
1. Are you a U.S. citizen?.....	Yes No
2. Do you have a will or trust now? .....	Yes No
3. Are you expecting to receive property or money from (circle all that apply): .....	Gift/Inheritance/ Lawsuit/Other: \$
If so, approximately how much?.....	
4. How many living children do you have? .....	
5. Are all your children legally yours (i.e. natural born or legally adopted)?.....	Yes No
6. In which state do you vote?.....	
7. Which state issued your driver's license? .....	
8. Do you have a divorce decree affecting your retirement assets or other property rights?.....	Yes No
<b>If "yes" to questions 2 or 8, please bring these documents to your appointment</b>	

**FINANCIAL INFORMATION (attach additional sheets or use the back if necessary – approximate values are fine for now)**

1. Do you own a home or any other real estate? Indicate which is your residence/homestead with "RES".

Description and Location	Titled in whose name? (Indicate if Jointly Owned)	Purchase Price	Market Value	Mortgage Amount	Market Value - Mortgage Equity
Total Net Value					

2. Do you own any other titled property such as a car, boat, airplane etc.?

Description	Titled in whose name? (Indicate if Jointly Owned)	Market Value	Less Mortgage	Equity
Total Net Value				

3. Do you have any checking accounts?

Name of Bank	Titled in whose name? (Indicate if Joint and/or Beneficiary Designated)	Approx. Balance
Total Value		

4. Do you have any other interest-bearing accounts (savings, money market) and/or CD's?

Name of Bank	Titled in whose name? (Indicate if Joint and/or Beneficiary Designated)	Approx. Balance
Total Value		

5. Do you own any stocks, bonds or mutual funds (including interests in closely held companies i.e. S-Corps, LLCs or partnerships)?

Number Shares	Name of Security or Institution	Titled in whose name? (Indicate if Joint and/or Beneficiary Designated)	Purchase Price	Current Value
Total Value				

6. Do you have any IRAs, pension plans or profit-sharing plans?

Description/Location	Designated Beneficiaries and Alternates	Current Value
Total Value		

7. Do you have any life insurance policies and/or annuities?

Name of Company	Insured	Policy Owner	1 <sup>st</sup> Designated Beneficiary	2 <sup>nd</sup> Designated Bene.	Death Benefit
Total Value					

8. Does anyone owe you money?

Description	Approx. Value
Total Net Value	

9. Do you have any special items of value such as coin collections, antiques, jewelry, etc.?

Description	Approx. Value
Total Net Value	

10. What is the approximate total value of all your remaining personal property--whatever you own that has not been included above? (clothes, furniture, etc.) Just estimate.....\$ \_\_\_\_\_

