

## CLIENT QUESTIONNAIRE – LIFESTYLE OF FUTURE MARRIAGE

(All information will remain confidential and will be shredded by our firm  
if you do not retain our services)

It would be helpful to us in preparing to meet with you if you would complete the questions as best as you can and return this questionnaire to our firm.

1. We strongly recommend that your prospective spouse have separate counsel in order to strengthen the effectiveness of any agreement executed by you and your spouse, if necessary. If your prospective spouse will retain counsel, please furnish such counsel's name, address and telephone number.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

2. Will you and your prospective spouse exchange medical information?

yes       no

3. Will you and your spouse exchange or permit disclosure of other information including but not limited to credit reports and information held by law enforcement agencies.

yes       no

4. Where will the marital home be located?

Address: \_\_\_\_\_

City,                      State,                      ZIP:  
\_\_\_\_\_

Is this currently the home of one prospective spouse?

yes       no

Name of Owner: \_\_\_\_\_

Does the other prospective spouse also own a home?

yes       no

If so, Address: \_\_\_\_\_  
City,                      State,                      ZIP:  
\_\_\_\_\_

5. Check below the form of ownership of the marital home.

- owned by husband
- owned by wife
- owned jointly as tenants in common
- owned jointly with right of survivorship

6. Who will pay for the cost of the housing?

- paid for equally by the parties
- paid for by the parties in proportion to their net taxable income
- paid for by the husband
- paid for by the wife
- other: \_\_\_\_\_

7. If new purchases of household furnishings will be made, will they be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?

- paid for by the wife?
- paid for by the party who made the purchase?

8. With respect to routine living expenses, will they be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?

9. With respect to automobile repair maintenance and replacement, will these expenses be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?
- paid for by the party for whose benefit the cost was incurred?

10. Do you and your prospective spouse currently have health insurance?

a. Please list coverage for you: \_\_\_\_\_

\_\_\_\_\_

b. Please list coverage for your prospective spouse:

\_\_\_\_\_

\_\_\_\_\_

11. With respect to health insurance, will such premiums be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?
- paid individually by each party?

12. Un-reimbursed medical expenses. These expenses are those rising out of deductibles or co-insurance. Such expenses will be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?
- paid for by the party for whose benefit the cost was incurred?

13. Catastrophic illness expense. A catastrophic illness expense is one that is not covered by health insurance or the limits of the insurance coverage have been exceeded. Such expenses will be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?
- paid for by the party for whose benefit the cost was incurred?

14. Long term care expense. Care in a nursing home or assisted living facility is not covered by Medicare or most health insurance policies.

a. Do you currently have Long Term Care insurance? \_\_\_\_\_ If so, list coverage information.

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b. Does your prospective spouse currently have Long Term Care insurance? \_\_\_\_\_ If so, list coverage information.

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c. If either does not have coverage, are there health issues that might prevent the purchase of Long Term Care Insurance?

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15. Extraordinary expenses. These expenses are non-routine, unusual expenses that are not medical expenses and not routine expenses. Such expenses will be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?
- paid for by the party for whose benefit the cost was incurred?

16. Tax returns. If from time to time you and your prospective spouse should find it beneficial to file a joint tax return, then the cost of the taxes and preparation will be:

- paid for equally by the parties?
- paid for by the parties in proportion to their net taxable income?
- paid for by the husband?
- paid for by the wife?

17. With respect to vacation and travel, such expenses will be:
- paid for equally by the parties?
  - paid for by the parties in proportion to their net taxable income?
  - paid for by the husband?
  - paid for by the wife?
18. With respect to club memberships, the recurring cost of membership will be:
- paid for equally by the parties?
  - paid for by the parties in proportion to their net taxable income?
  - paid for by the husband?
  - paid for by the wife?
  - paid for by the primary member?
19. If upon discussion with your prospective spouse you have agreed to do any of the following, please check the appropriate box and specify the details beneath:
- a. Will you give prospective spouse the right to live in the marital residence for life, after your death?
- yes       no

b. Have you agreed to leave your prospective spouse any specific property in your will?

yes       no

If so, describe:

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c. Have you agreed to leave your prospective spouse any cash money?

yes       no

If so, how much? \$\_\_\_\_\_

d. Have you agreed to name your prospective spouse as beneficiary of any life insurance proceeds?

yes       no

If so, please state policy number, name of company and face amount of proceeds?

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20. Have you agreed to name your spouse as beneficiary of any employment benefits?

yes       no

If so, name of employee benefit plan?

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21. Have you agreed to own any assets jointly with your prospective spouse with right of survivorship?

yes       no

If so, describe such property.

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