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IC DATE: \_\_\_\_\_ TIME: \_\_\_\_\_ FILE NO.: \_\_\_\_\_  
 ATTORNEY: **Autumn O. Beck, Esq.**  
 MATTER TYPE: \_\_\_\_\_  
 IC FEE: \_\_\_\_\_ PAID: CASH \_\_\_\_\_ CHECK # \_\_\_\_\_

**NEW CLIENT INFORMATION FORM**

**I. BASIC INFORMATION**

|                                  |  |
|----------------------------------|--|
| Your Full Name:                  |  |
| Your Birth Date:                 |  |
| Your Social Security Number:     |  |
| Who referred you to this office? |  |

| PHONE NUMBERS | May we call this number? |
|---------------|--------------------------|
| Home          | Yes/No                   |
| Business      | Yes/No                   |
| Cell          | Yes/No                   |
| Other         | Yes/No                   |

|   |  |
|---|--|
| Address where IT IS SAFE to send mail to you:               |  |
| Your Residence Address (If Different from Mailing Address): |  |
| E-mail Address:   |  |

Do you participate in any of the following social networking sites? Please check all that apply.  
 Facebook  Twitter  Linkedin  MySpace  Tagged  Classmates  You Tube  
 Other: \_\_\_\_\_

Do you have a blog: Yes/No

|                                       |  |
|---------------------------------------|--|
| Your Spouse's Full Name:              |  |
| Your Spouse's Birth Date:             |  |
| Your Spouse's Social Security Number: |  |
| Your Spouse's Mailing Address:        |  |

Does your spouse participate in any of the following social networking sites? Please check all that apply.

Facebook  Twitter  Linkedin  MySpace  Tagged  Classmates  Utube  
 Other: \_\_\_\_\_

Does your spouse have a blog: Yes/No

How long have you been a resident of Florida? \_\_\_\_\_  
 How long have you been a resident of \_\_\_\_\_ County? \_\_\_\_\_  
 Are you or your spouse a member of the Armed Forces? If so, which branch? \_\_\_\_\_

## II. MARITAL HISTORY

Will the dissolution of marriage action be contested? \_\_\_\_\_

If yes, please state why you feel it will be contested: \_\_\_\_\_  
 \_\_\_\_\_

### Marriage:

Date: \_\_\_\_\_ Place: \_\_\_\_\_

Date of Separation: \_\_\_\_\_

At time of separation, who left the marital residence? \_\_\_\_\_

Where is the party who left the marital residence now residing? \_\_\_\_\_

What was your or your spouse's maiden name? \_\_\_\_\_

Do you or your spouse wish it restored? \_\_\_\_\_

## III. EDUCATION HISTORY

Please detail YOUR educational history, including technical, college, graduate, and professional school history and any certifications.

| Educational Institution | Major | Degree Earned | Date Completed |
|-------------------------|-------|---------------|----------------|
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |

Please detail YOUR SPOUSE'S educational history, including technical, college, graduate, and professional school history and any certifications.

| Educational Institution | Major | Degree Earned | Date Completed |
|-------------------------|-------|---------------|----------------|
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |
|                         |       |               |                |

**IV. EMPLOYMENT HISTORY**

Your Employer: \_\_\_\_\_  
Type of Business: \_\_\_\_\_

Your Salary:

Monthly: \$ \_\_\_\_\_ Bi-weekly: \$ \_\_\_\_\_  
Annually: \$ \_\_\_\_\_ 15th & 30<sup>th</sup>: \$ \_\_\_\_\_

Please state any other sources of income you have and the amounts:  
\_\_\_\_\_

Please state your previous work experience:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Your Spouse=s Employer: \_\_\_\_\_  
Type of Business: \_\_\_\_\_

Spouse=s Salary:

Monthly: \$ \_\_\_\_\_ Bi-weekly: \$ \_\_\_\_\_  
Annually: \$ \_\_\_\_\_ 15th & 30<sup>th</sup>: \$ \_\_\_\_\_

Please state any other sources of income your spouse has and the amounts:  
\_\_\_\_\_

Please state your spouse’s previous work experience:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you or your spouse is a stay-at-home parent, please list the type(s) of employment before having children.  
\_\_\_\_\_  
\_\_\_\_\_

Did you or your spouse attend college at any time during the marriage?  
You \_\_\_\_\_ Spouse \_\_\_\_\_

If so, were you or your spouse employed during that time?  
You \_\_\_\_\_ Spouse \_\_\_\_\_

If so, please state when and where:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## V. INFORMATION REGARDING CHILDREN

Name, date of birth, place of birth, and Social Security Number for all of your children:

| Full Name | Date of Birth | Place of Birth | Social Security No. |
|-----------|---------------|----------------|---------------------|
|           |               |                |                     |
|           |               |                |                     |
|           |               |                |                     |
|           |               |                |                     |
|           |               |                |                     |

Present address of any minor children: \_\_\_\_\_

\_\_\_\_\_

Residence of each child for last five (5) years [or since birth if the child is younger than five (5) years]:

\_\_\_\_\_

\_\_\_\_\_

Present parenting arrangement (custody) of children:

\_\_\_\_\_

\_\_\_\_\_

Has a permanent parenting arrangement (custody) been agreed to or discussed by you and your spouse? Yes \_\_\_ No \_\_\_ If so, please give details:

\_\_\_\_\_

\_\_\_\_\_

Is health insurance provided for the family through your job, your spouse's job, or another arrangement? Yes \_\_\_ No \_\_\_ If so, please give details:

\_\_\_\_\_

Please detail any other information regarding health and life insurance for the children:

\_\_\_\_\_

## VI. FINANCES

### **1. REAL PROPERTY**

Do you own your home? Yes \_\_\_ No \_\_\_ If yes, please state:

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

Please also provide legal description (copy of Deed), if available.

Purchase Price: \$ \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Titled in Name(s) of: \_\_\_\_\_

Approximate fair market or current value: \$ \_\_\_\_\_

Source of funds used for purchase of home: \_\_\_\_\_

\_\_\_\_\_

Current mortgage holder: \_\_\_\_\_

Approximate amount of mortgage: \$ \_\_\_\_\_

Do you, alone or jointly with your spouse, own any other real property? Yes \_\_\_ No \_\_\_

Does your spouse, alone, own any other real property? Yes \_\_\_ No \_\_\_

If yes, as to each parcel of real property, please provide the following (Use back of page if necessary):

Address or location: \_\_\_\_\_

Please also provide legal description (copy of Deed), if available.

Purchase Price: \$ \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Titled in name(s) of: \_\_\_\_\_

Approximate fair market or current value: \$ \_\_\_\_\_

Source of funds used for purchase of home: \_\_\_\_\_

Current mortgage holder: \_\_\_\_\_

Approximate amount of mortgage: \$ \_\_\_\_\_

## 2. BUSINESS

Do either you or your spouse have an interest in a business, P.A., etc? Yes \_\_\_ No \_\_\_

Type of business: \_\_\_\_\_

Describe your interest/ involvement: \_\_\_\_\_

Your interest value of business: \_\_\_\_\_

Your contribution to business: \_\_\_\_\_

Spouse's contribution to business: \_\_\_\_\_

## 3. INTANGIBLE PERSONAL PROPERTY

Do you, alone or jointly with your spouse, own any certificates of deposit, savings accounts or other bank accounts? Yes \_\_\_ No \_\_\_

Does your spouse, alone, own any certificates of deposit, savings accounts, or other bank accounts? Yes \_\_\_

If yes, please provide the following information as to each account or CD:

Name of Bank: \_\_\_\_\_

Account Number: \_\_\_\_\_

Titled in name(s) of: \_\_\_\_\_

Amount in each account or CD: \_\_\_\_\_

Accrual Date: \_\_\_\_\_

Do you, alone or jointly with your spouse, own any stocks, bonds, treasury bills, etc.?

Yes \_\_\_ No \_\_\_

Does your spouse, alone, own any stocks, bonds, treasury bills, etc.? Yes \_\_\_ No \_\_\_

If so, please list briefly and state in whose name they are held, the amount, and accrual date, if known:

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Please state whether you or your spouse has any retirement benefits, pension plans, IRAs, etc., and give any information you may have as to those benefits:

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List all life insurance policies held by you or your spouse. Please state, as to each policy, the following information:

Company/Agent: \_\_\_\_\_  
Owner: \_\_\_\_\_  
Policy #: \_\_\_\_\_  
Beneficiary: \_\_\_\_\_  
Face value: \$ \_\_\_\_\_  
Cash value: \$ \_\_\_\_\_ Loans Outstanding: \_\_\_\_\_

List all health insurance policies held by you or your spouse. Please state, as to each policy, the following information:

Company/Agent: \_\_\_\_\_  
Owner (Self or Spouse): \_\_\_\_\_  
Insured: \_\_\_\_\_  
Type of Coverage: \_\_\_\_\_

**4. TANGIBLE PERSONAL PROPERTY**

As to the car you drive, please state:

Make: \_\_\_\_\_ Year: \_\_\_\_\_ Model: \_\_\_\_\_  
Condition: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_  
Financed by: \_\_\_\_\_  
Amount Owed: \$ \_\_\_\_\_  
Titled in name(s) of: \_\_\_\_\_

As to the car your spouse drives, please state:

Make: \_\_\_\_\_ Year: \_\_\_\_\_ Model: \_\_\_\_\_  
Condition: \_\_\_\_\_  
Approximate Value: \$ \_\_\_\_\_  
Financed by: \_\_\_\_\_  
Amount Owed: \$ \_\_\_\_\_  
Titled in name(s) of: \_\_\_\_\_

Do you and/or your spouse own any other vehicles (boats, airplanes, motorcycles, etc.)?

Yes \_\_\_\_\_ No \_\_\_\_\_

As to each vehicle, please state the make, year, model, condition, approximate value, financed by whom, amount owed, and how titled:

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Does either you or your spouse own any valuable jewelry, china, crystal, silver, valuable collections such as art, antiques, coins, stamps, etc? Yes \_\_\_\_ No \_\_\_\_

If so, please describe, and state approximate value of each. Please also indicate if it is an inter-spousal gift, wedding gift, or individual gift from someone other than spouse:

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Please identify items, including, but not limited to, stocks, bonds, real estate, furniture, antiques, etc., which you or your spouse owned at the time of your marriage, inherited subsequent to marriage, or received as a gift subsequent to marriage. Also, identify any cash either party had at the time of marriage, inherited subsequent to marriage, or received as a gift subsequent to marriage:

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Do you have any knowledge of assets hidden by your spouse or use of funds by your spouse for non-marital, or what you may consider inappropriate, purposes? If yes, please specify:

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**5. DEBTS**

List all credit cards or charge accounts upon which either you or your spouse may charge. If known, please list the current balances and in whose name(s) the card or account is held (use back of this page, if more space is needed):

| Creditor | Name in Which Account is Held | Balance |
|----------|-------------------------------|---------|
|          |                               |         |
|          |                               |         |
|          |                               |         |
|          |                               |         |
|          |                               |         |
|          |                               |         |
|          |                               |         |
|          |                               |         |
|          |                               |         |

Please list any bank loans or other loans including student loans upon which you or your spouse is obligated or any guarantees for obligations on which you have joined with your spouse and which are outstanding at this time:

Name of bank or lending institution: \_\_\_\_\_  
Original amount of loan: \_\_\_\_\_  
Current amount of loan: \_\_\_\_\_

Who signed on loan: \_\_\_\_\_  
Purpose of loan: \_\_\_\_\_  
When due: \_\_\_\_\_  
How paid: Monthly ( ); Quarterly ( ); Yearly ( ); Other: \_\_\_\_\_  
Amount of each payment: \$ \_\_\_\_\_  
When last payment due: \_\_\_\_\_

Do you have any other debts? If yes, please state the creditor, in whose name(s) the debt is, the nature of the debt, and the balance owed.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### VII. DISSOLUTION INFORMATION

Is either you or your spouse romantically involved with anyone? Yes \_\_\_ No \_\_\_  
(If the answer is yes, please bring same to my attention during the initial conference.)

If you and your spouse have reached any tentative agreements, please state, in detail, the terms of the agreement(s). Also, state whether the agreement(s) was oral or written:

\_\_\_\_\_  
\_\_\_\_\_

Have there been any instances of spousal abuse for which domestic violence charges were filed?  
Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have any concern that your spouse might physically harm you or your children?  
Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, explain: \_\_\_\_\_

Has either you or your spouse been previously married? Self \_\_\_\_\_ Spouse \_\_\_\_\_  
If so, please give details of alimony or child support which is received or paid:

\_\_\_\_\_  
\_\_\_\_\_

If you, your spouse, or children have any specific or particular health or dental problems, set forth same in detail:

\_\_\_\_\_  
\_\_\_\_\_

Please state what you desire and expect as a result of your dissolution of marriage, such as alimony, child support, and division of property, both real estate and personal property:

\_\_\_\_\_  
\_\_\_\_\_

Set forth the priority of your desires. In other words, what is of most importance? (i.e., 1. Custody, 2. Possession of house, 3. Alimony, 4. Health coverage, 5. College education for yourself or your children,

6. Child support, etc.):

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Set forth what you are willing to settle for:

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At any time during the marriage, were you involved in a business venture of your own? If so, describe and give dates. If your spouse contributed any funds or services to the organization or running of the business, describe in full and give dates and source of funds contributed:

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Did your spouse assist in the organization or development of the business venture? If so, please set forth the nature of your spouse's assistance:

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If you receive from, or give to, your spouse a household allowance, please indicate the present amount, any changes in the amount during the past year and how such allowance is normally used:

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If you anticipate a substantial increase in your or your spouse's income or expenses in the near future, please indicate the nature and amount:

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For the past five (5) years, did you and your spouse file joint or individual Federal Income Tax Returns?

Joint: \_\_\_\_\_ Individual: \_\_\_\_\_

Who has possession of tax returns? \_\_\_\_\_