

Financial Process Questionnaire

Name: _____ Date of Birth: _____

Address: _____

City/Zip: _____

Phone: preferred contact number Home Work Cell

(Home) _____ (Work) _____ (Cell) _____

Email: _____

Spouse Email: _____

Children

Name	Date of Birth	Mother	Father	Both	Partner	Other
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Currently Lives With

Current Marital Circumstances

Years Married: _____ Date of Marriage: _____

Currently Separated? Yes No Date of Separation: _____

Filed for Divorce? Yes No Date of Filing: _____

Who Filed? _____ Attorney's Engaged? Yes No

Attorney's Name: _____ Phone: _____

Email: _____

Other Professionals (CPA, Therapist, Etc) Name: _____

Phone: _____ Email: _____

Please initial here to give permission to speak with these professionals. _____



Financial Process Questionnaire

Was the separation or divorce expected?

- Yes, for a long time
- Yes, but only recently
- No, unexpected

Do you want this divorce?

- Not at all
- I have mixed feelings
- No, but I am resigned to it
- I feel it is for the best

Previously Married? Yes No

If "yes", Date of Marriage: _____

Date of Divorce _____

Factors Contributing to Marital Problems (check all that apply)

- Recently had difficulty communicating
- Difference in interests
- Difference in ethnic or racial background
- Difference in expectations about family life
- Outside relationships or interests
- Job commitment
- Always had difficulty communicating
- Differences in education level
- Difference in expectations about marriage
- Changes in lifestyles, values
- ADD/ADHD
- School Commitment

Other (please explain) _____

Major Financial Events and/or Financial Changes Occurring With the Last 12 Months:

- Started school/training program
- Entered job market
- Lost job
- Job security
- Legal problems
- Outstanding debt
- Foreclosure
- Child educational expenses
- Graduated from school/training
- Changed jobs
- Moved residence
- Increase in financial responsibility
- Establishing credit
- Credit problems
- Children's special needs expenses
- Changes in childcare



Financial Process Questionnaire

- Undertaken major new expense
- Death of significant friend/family
- Child/Spousal support changes
- Pension Plan Changes (current status, insolvent, frozen, etc.) Please explain:
- Bankruptcy (self, former spouse, other)
- Interest rate changes

Other (explain):

Financial Management

Who manages the checkbook? _____ Who applies for credit? _____

Who pays the bills? _____

What methods have you used to manage financial decisions during your marriage?

- Negotiating
- Dictate
- Problem Solving
- Avoiding
- Accomodating
- Clear roles defined
- Arguing, one wins
- Arguing, resolution
- Arguing, no resolution

Who is the Saver? _____

Strategies for Saving Money (check all that apply):

- 401(k)
- IRA's
- Savings Accounts
- Coupons
- Online Banking
- Rainy Day Fund
- 501c3
- Limited Partnerships
- LLC's
- C-Corporation
- S Corp
- Off-shore accounts
- Worries
- Stockpiling
- Delayed Gratification
- Separate Accounts
- Separate Credit Cards
- Do without
- Savings based on future
- Written Budget
- Health Savings Account
- Partnerships



Financial Process Questionnaire

Who is the Spender? _____

Strategies for Spending Money (check all that apply):

- "It was on sale"
- Impulse Purchasing
- Retirement Plans
- Stock, Bonds
- Spending based on future income (raise, bonus, winning lottery, selling rental property, etc.)
- Spending based on future worries
- Separate Credit Cards
- Coupons
- Determine Budget based on spending
- Rigid Financial Management
- Arbitrary Spending
- Spend w/in a budget
- Separate Accounts

Personal Career Financial History

Position: _____ Employment Length: _____

Annual Income: _____ Percentage of Total Income: _____

Other paid/non-paid work and employment length: _____

Homemaker For how long: _____

What positions did you hold prior to being a homemaker? _____

How Long? _____ Paid/non-paid: _____

My biggest financial concern is: _____

It's important financially to me that: _____



Financial Process Questionnaire

My biggest financial concern for my spouse is:

I worry financially my spouse will:

(Regardless of age) My biggest financial concern for our child(ren) is:

