

### Financial Snapshot

NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ Date: \_\_\_\_\_

SPOUSES NAME: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ MARRIAGE DATE: \_\_\_\_\_

**ASSETS** CURRENT VALUE SP?

CHK / SAV / BROK / CASH

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**RETIREMENT PLANS**

\_\_\_\_\_

\_\_\_\_\_

CONTRIBUTION/EMPLOYER MATCH: % %

**BUSINESS INTERESTS**

\_\_\_\_\_

\_\_\_\_\_

**REAL ESTATE PROPERTY**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**PERSONAL ASSETS**

AUTOMOBILES

ITEMS OF VALUE

RV

ATV / BOAT

\_\_\_\_\_

**TOTAL ASSETS:**

\_\_\_\_\_

**LIABILITIES**

RATE

MORTGAGE LOAN %

EQUITY LINE OF CREDIT / LOAN %

AUTO LOAN (1) %

AUTO LOAN (2) %

CREDIT CARDS %

TAX DEBTS %

STUDENT LOANS %

**TOTAL LIABILITIES**

\_\_\_\_\_

**NET WORTH TOTAL**

\_\_\_\_\_

**GROSS INCOME** CLIENT 1 CLIENT 2 SP?

WAGES \_\_\_\_\_

PENSION \_\_\_\_\_

SOCIAL SECURITY \_\_\_\_\_

OTHER: \_\_\_\_\_

EXEC COMP \_\_\_\_\_

E.O.M. CASH FLOW + = - \_\_\_\_\_

HOW USED / SAVED \_\_\_\_\_

**LIFE INSURANCE W/ CASH VALUE**

GROUP \_\_\_\_\_

INDIVIDUAL \_\_\_\_\_

INDIVIDUAL \_\_\_\_\_

**LIFE INSURANCES W/O CASH VALUE**

GROUP \_\_\_\_\_

INDIVIDUAL \_\_\_\_\_

INDIVIDUAL \_\_\_\_\_

**NOTES**

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ATTORNEY \_\_\_\_\_

QUOTED FEE \_\_\_\_\_

INTERVIEWED BY: \_\_\_\_\_

## **Questions to Get Answered**

### **Initial Consultation**

Where are you in the divorce process? (Have an attorney, filed for divorce, financial affidavit completed?)

Is there anything that you have already agreed on?

How would you describe your financial situation?

Who pays the bills / manages the money?

### **One on One**

How are the kids doing?

What is most important to you? (Examples – the home, cash, retirement savings, specific investments)

How are you two communicating today?

Do you anticipate that your lifestyle may need to change?

Could your spouse be hiding money?

What would you like to discuss regarding your parenting plan?

Have you talked about spousal maintenance?

What sticking points or hot points may come up during mediation?

Is there anything that you are willing to give up?

Is there a history of domestic violence?

Have there been any drug or alcohol related convictions or arrests?