

MARSH, HIGGINS, BEATY & HATCH, P.C.

**CLIENT INFORMATION AND WORKSHEET
FOR DISSOLUTION/LEGAL SEPARATION WITHOUT CHILDREN**

(Please use a pencil when completing this worksheet.)

Date: _____

GENERAL INFORMATION (DEPARTMENT OF HEALTH CERTIFICATE)

1. Petitioner: _____
List full name (include middle initial or middle name)

Date of Birth: _____ Birthplace: _____

SSN: _____ Driver's License: # _____ State:

2. Respondent: _____
List full name (include middle initial or middle name)

Date of Birth: _____ Birthplace: _____

SSN: _____ Driver's License: # _____ State:

3. Are you filing for _____ dissolution or _____ legal separation?

4. Last known address of wife: _____

Within City limits? _____ Yes _____ No

Wife's maiden name: _____

Do you want to change your name back to maiden name? _____ Yes _____ No

5. Last known address of husband: _____

Stocks/Bonds
Business Investments

Social Security, Pension & Retirement Benefits
Insurance

COMMUNITY PROPERTY

10. Complete the list for **Community Property** (all property acquired during marriage and prior to separation, excluding inheritances or gifts to one spouse only):

<u>Description of Item</u>	<u>Fair Market Value</u>	<u>Amount</u>	<u>Net Owing Value</u>	<u>Proposed Award to Husband</u>	<u>Proposed Award to Wife</u>
<i>Example: Refrigerator</i>	800	300	500		X

The following described
real property:
**(Give both street address and
legal description, if known)**

The following vehicles
including serial numbers:

Household Furniture,
Furnishings and Appliances:

Stocks:

Bonds:

COMMUNITY PROPERTY - CONTINUED

<u>Description of Item</u>	<u>Fair Market Value</u>	<u>Amount Owing</u>	<u>Net Value</u>	<u>Proposed Award to Husband</u>	<u>Proposed Award to Wife</u>
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Accounts:

Other personal property:

SEPARATE PROPERTY

11. **Complete the list for Separate Property (all property acquired before marriage or after separation, including inheritances or gifts to one spouse).**

<u>Description of Item</u>	<u>Fair Market Value</u>	<u>Amount Owing</u>	<u>Net Value</u>	<u>Proposed Award to Husband</u>	<u>Proposed Award to Wife</u>
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The following described real property:
(Give both street address and legal description, if known)

The following vehicles including serial numbers:

Household Furniture, Furnishings and Appliances:

SEPARATE PROPERTY - CONTINUED

<u>Description of Item</u>	<u>Fair Market Value</u>	<u>Amount</u>	<u>Net Owing Value</u>	<u>Proposed Award to Husband</u>	<u>Proposed Award to Wife</u>
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Stocks:

Bonds:

Accounts:

Other personal property:

COMMUNITY DEBTS AND LIABILITIES

12. Complete the list for **Community Debts and Liabilities** (any debts incurred during marriage and prior to separation).

<u>Creditor</u>	<u>Description of Debt</u>	<u>Balance</u>	<u>Amount of Last Payment</u>	<u>Mo. Payment</u>	<u>Award to Husband</u>	<u>Award to Wife</u>
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SEPARATE DEBTS AND LIABILITIES

13. Complete the list for Separate Debts and Liabilities (any debts incurred before marriage or after separation).

<u>Creditor</u>	<u>Description of Debt</u>	<u>Balance</u>	<u>Amount of Last Payment</u>	<u>Mo. Payment</u>	<u>Award to Husband</u>	<u>Award to Wife</u>
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PENSION INFORMATION

14. You Spouse

Name of Plan

Years of Credit Service

Vested (Yes or No)

Monthly Retirement Benefit at
Age Eligible to Draw

Present Value of Pension

(If present value determined by employer, union or the like, attach letter(s); if otherwise determined, attach computation page.)

SPOUSAL MAINTENANCE
(Check Appropriate Choices)

15. Spousal maintenance should not be ordered.
 There is a need for temporary maintenance until dissolution is final.
 There is a need for spousal maintenance.

The following arrangements for spousal maintenance have been made and are/not part of a written separation agreement:

RESTRAINING ORDER

16. Is there a need for a restraining order?

17. Is wife pregnant? _____

The father of the unborn child is: the husband
 not the husband*
 unknown

***CHILD OR CHILDREN OF UNKNOWN FATHER:**
(SEPARATE PATERNITY ACTION REQUIRED IF ANY)

18. **RELIEF REQUESTED**

(Select all appropriate requests.)

- _____ Provide reasonable maintenance for the husband/wife.
 - _____ Approve the separation agreement.
 - _____ Dispose of property and liabilities.
 - _____ Change name of wife to: _____
 - _____ Change name of husband to: _____
 - _____ Enter a permanent restraining order.
 - _____ Order payment of attorney's fees, other professional fees and costs.
 - _____ Other: _____
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19. **PERSONAL INFORMATION**

Occupation:

You: _____ Spouse: _____
The highest year of education completed:
You: _____ Spouse: _____
Presently employed? You: Yes No Spouse: Yes No

a. If yes: (1) Name, Address and Telephone of Employer:
You: _____ Spouse: _____

(2) When did you/they start work there (month/year)?
You: _____ Spouse: _____

b. If no: (1) When did you/they last work (month/year)?
You: _____ Spouse: _____

(2) What were your/their gross month earnings?

You: \$ _____ Spouse: \$ _____

(3) Why are you/they presently unemployed?
You: _____ Spouse: _____

20. **INCOME INFORMATION**

GROSS MONTHLY INCOME. [Please attach copies of your last two paystubs.]

If you are paid on a weekly basis, multiply your weekly gross pay by 4.3 to determine your monthly wages and salaries. If you are paid every two weeks, multiply your gross pay by 2.15. If you are paid twice monthly, multiply your gross pay by 2. If you are paid once a month, list that amount below.

	<u>You</u>	<u>Spouse</u>
a. Wages and Salaries		
b. Interest and Dividend Income		
c. Business Income		
d. Spousal Maintenance From Other Relationships		
e. Other Income		
f. Total Gross Monthly Income (add lines a through e)		
g. Actual Gross Income (Year to date)		

MONTHLY DEDUCTIONS FROM GROSS INCOME.

	<u>You</u>	<u>Spouse</u>
a. Income Taxes		
b. FICA/Self-employment Taxes		
c. State Industrial Insurance Deductions		
d. MANDATORY Union/Professional Dues		
e. Pension Plan Payments		
f. Spousal Maintenance Paid		
g. Normal Business Expenses		
h. Total Deductions from Gross Income (add lines a through g)		

	<u>You</u>	<u>Spouse</u>
MONTHLY NET INCOME. (Line f from gross income minus line h from deductions)		

MISCELLANEOUS INCOME.

	<u>You</u>	<u>Spouse</u>
a. Child support received from other relationships		
b. Cash value of life insurance		

INCOME INFORMATION - CONTINUED

	<u>You</u>	<u>Spouse</u>
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c. Other miscellaneous income
 (list source and amounts):

		<u>You</u>	<u>Spouse</u>
d.	Total Miscellaneous Income (add lines a through c)		

If the income of either party is disputed, state monthly income you believe is correct and explain below:

21. **AVAILABLE ASSETS**

	<u>You</u>	<u>Spouse</u>
Cash on hand	\$ _____	\$ _____
On deposit in banks	\$ _____	\$ _____
Stocks and Bonds	\$ _____	\$ _____
Other:	\$ _____	\$ _____

22. **MONTHLY EXPENSE INFORMATION**

My monthly expenses for myself and _____ dependents are: (Expenses should be calculated for the future, after separation, based on the anticipated residential schedule for the children.)

HOUSING.

Rent, 1st mortgage or contract payments	
Installment payments for other mortgages or encumbrances	
Taxes & insurance (if not in monthly payment)	
Total Housing	\$ _____

MONTHLY EXPENSE INFORMATION - CONTINUED

UTILITIES.

Heat (gas & oil)
Electricity
Water, sewer, garbage
Telephone
Cable
Other
Total Utilities \$ _____

FOOD AND SUPPLIES.

Food for ____ persons
Supplies (paper, tobacco, pets)
Meals eaten out
Other
Total Food Supplies \$ _____

CHILDREN.

Day Care/Babysitting
Clothing
Tuition (if any)
Other child related expenses
Total Expenses Children \$ _____

TRANSPORTATION.

Vehicle payments or leases
Vehicle insurance & license
Vehicle gas, oil, ordinary
maintenance
Parking
Other transportation expenses
Total Transportation \$ _____

HEALTH CARE. (Omit if fully covered)

Insurance
Uninsured dental, orthodontic,
medical, eye care expenses
Other uninsured health expenses
Total Health Care \$ _____

MONTHLY EXPENSE INFORMATION - CONTINUED

PERSONAL EXPENSES (Not including children).

Clothing
 Hair care/personal care expenses
 Clubs and recreation
 Education
 Books, newspapers, magazines, photos
 Other
 Total Personal Expenses \$ _____

MISCELLANEOUS EXPENSES.

Life Insurance (if not deducted from income)
 Other _____
 Other _____
 Total Miscellaneous Expenses \$ _____

TOTAL HOUSEHOLD EXPENSES \$ _____

INSTALLMENT DEBTS (not addressed in Monthly Expense Information above):

<u>Creditor</u>	<u>Description of Debt</u>	<u>Balance</u>	<u>Month of Last Payment</u>
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