# 0BPRENUPTIAL AGREEMENT INFORMATION FORM (without children)

Meeting Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signing Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ File No.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## **1Bbasic PERSONAL information**

|  |  |  |  |
| --- | --- | --- | --- |
|  | | Husband | Wife |
| Full Legal Name | |  |  |
| Home Address | Street |  |  |
| City/State/Zip |  |  |
| Telephone | |  |  |
| County of Residence | |  |  |
| Occupation | |  |  |
| Employer | |  |  |
| Email Address | |  |  |
| Date of Birth | |  |  |
| Date of Marriage | |  | |
| Are you a US Citizen? | |  |  |

## **2BADDITIONAL INFORMATION**

|  |  |  |
| --- | --- | --- |
|  | Husband | Wife |
| Do you have an expectancy to inherit a substantial sum of money? |  |  |
| Do you have any personal loans payable to you? |  |  |
| Do you have a continuing obligation from a previous marriage? |  |  |

Please list any questions or concerns you would like to discuss at the consultation meeting. Use additional paper if necessary.

|  |
| --- |
|  |

Both the husband and wife need to complete an Asset Inventory itemizing all of their assets if owned separately.

The most recent income tax return will also be attached to the Agreement.

## **INVENTORY - HUSBAND**

|  |  |  |  |
| --- | --- | --- | --- |
| Annual Income |  | | |
| FMV of Primary Residence |  | | |
| Mortgage |  | | |
| FMV of Other Real Estate Properties |  | | |
| Mortgage |  | | |
| Location Address |  | | |
| Personal Belongings: The contents of your house. |  | | |
| Antiques, jewelry, coins, guns (not included above) |  | | |
| Automobiles (include year, make, and model) |  | | |
| Cash, Savings Accounts, CDs |  | | |
| Stocks and Bonds (not in a Retirement Account) |  | | |
| Pension/401K/IRA |  | | |
| Beneficiary: |  | | |
| Annuities |  | | |
| Beneficiary: |  | | |
| Life Insurance |  | | |
| Beneficiary: |  | | |
| FMV of Business  Type of Entity: |  | | |
| Any other assets not listed above: |  | | |
| **TOTAL GROSS ESTATE** |  | | |
| Other Debts (credit cards, auto loans, etc.) |  |  |  |
| **NET WORTH** |  | | |

## **ASSET INVENTORY - WIFE**

|  |  |  |  |
| --- | --- | --- | --- |
| Annual Income |  | | |
| FMV of Primary Residence |  | | |
| Mortgage |  | | |
| FMV of Other Real Estate Properties |  | | |
| Mortgage |  | | |
| Location Address |  | | |
| Personal Belongings: The contents of your house. |  | | |
| Antiques, jewelry, coins, guns (not included above) |  | | |
| Automobiles (include year, make, and model) |  | | |
| Cash, Savings Accounts, CDs |  | | |
| Stocks and Bonds (not in a Retirement Account) |  | | |
| Pension/401K/IRA |  | | |
| Beneficiary: |  | | |
| Annuities |  | | |
| Beneficiary: |  | | |
| Life Insurance |  | | |
| Beneficiary: |  | | |
| FMV of Business  Type of Entity: |  | | |
| Any other assets not listed above: |  | | |
| **TOTAL GROSS ESTATE** |  | | |
| Other Debts (credit cards, auto loans, etc.) |  |  |  |
| **NET WORTH** |  | | |

I have completed the above form and certify that to the best of my knowledge the information provided above is true and correct.

*Client*