# 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.

## **ASSET INVENTORY – husband – COMPLETE WITH ACCOUNT NUMBERS AND EXACT AMOUNTS**

|  |  |  |  |
| --- | --- | --- | --- |
| 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 – COMPLETE WITH ACCOUNT NUMBERS AND EXACT AMOUNTS**

|  |  |  |  |
| --- | --- | --- | --- |
| 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*