

Financial Divorce Expert
Neutral.Factual.Essential.

19415 Deerfield Avenue, Suite 307
Lansdowne, VA 20176

703-727-2222
joan@financialdivorceexpert.com

Divorce Preparation Guide
(This will help you to become organized and identify needed information)

Thank you for your interest in *Financial Divorce Expert* To receive the most value from your consultation, please do your best to fill out this information as thoroughly as possible. Don't worry if you don't have all your information now. **Be assured that all of your information will be kept COMPLETELY CONFIDENTIAL.**

Personal Information

Date _____

1. Your Name _____ Date of Birth _____

Confidential Phone Number _____

Confidential Email address _____

Can we leave a voice or email message for you? _____

Have you consulted an attorney? _____ Therapist? _____

Attorney's name: _____ Firm: _____

Therapist's name: _____

2. Spouse's name _____ Date of Birth _____

Has your spouse consulted an attorney? _____ Therapist? _____

Attorney's name: _____ Firm: _____

Therapist's name: _____

Number of minor children from this marriage:

Number of minor children from other marriages:

Child's Name	Age(s)	Date of Birth	Future Graduation Date
_____	/	/	/
_____	/	/	/
_____	/	/	/
_____	/	/	/
_____	/	/	/

Employment:

You: Company: _____ # of years _____
Gross Earnings Per Year: _____

Spouse: Company: _____ # of years _____
Gross Earnings Per Year: _____

Assets: Please indicate how the asset or debt is titled: H-Husband, W-Wife, JT-Joint

Marital Home Address: _____

Title: _____ Date of Purchase: _____ Purchase Price: _____

Current Value: _____ Current Mortgage: _____

Second Home Address: _____

Title: _____ Date of Purchase: _____ Purchase Price: _____

Current Value: _____ Current Mortgage: _____

R e n t a l R e a l E s t a t e A d d r e s s : _____

Title: _____ Date of Purchase: _____ Purchase Price: _____

Current Value: _____ Current Mortgage: _____

Checking/Savings/Money Market/Investment-Brokerage (not retirement):

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Personal Property: Autos, collections, antiques, sterling silver service, etc.

Title: _____ Auto Make, Model, Year: _____ Value: _____

Title: _____ Auto Make, Model, Year: _____ Value: _____

Title: _____ Auto Make, Model, Year: _____ Value: _____

Title: _____ Auto Make, Model, Year: _____ Value: _____

Title: _____ Name of Item: _____ Value: _____

Title: _____ Name of Item: _____ Value: _____

Title: _____ Name of Item: _____ Value: _____

Retirement Accounts (Contributory): 401-k, 403b, 457, DCOMP, ESOP, IRA, Roth IRA

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Title: _____ Company Name: _____ Balance: _____

Retirement Accounts: (Defined Benefit Pension)

Title: _____ Company/Organization: _____

Date Service Began: _____ Age Normal Retirement: _____

Date Normal Retirement _____ Monthly Benefit at Retirement:

Retirement Accounts: (Defined Benefit Pension)

Title: _____ Company/Organization: _____

Date Service Began: _____ Age Normal Retirement: _____

Date Normal Retirement _____ Monthly Benefit at Retirement:

Debt: (Credit Cards, 2nd Mortgage, Signature Loans, Auto Loans, 401-k Loans

Title: _____ Company Name: _____ Balance: _____ Mo. Payment:

Title: _____ Company Name: _____ Balance: _____ Mo. Payment:

Title: _____ Company Name: _____ Balance: _____ Mo. Payment:

Title: _____ Company Name: _____ Balance: _____ Mo. Payment:

Title: _____ Company Name: _____ Balance: _____ Mo. Payment:

Title: _____ Company Name: _____ Balance: _____ Mo. Payment:

Please help us to help others by telling us how you found *Financial Divorce Expert*:

Internet search (Search terms used?) _____

Website (What site or article?) _____

Other media (Source?) _____

If Referred, we appreciate their email, phone and/address :

Now that you have completed our Personal Divorce Snapshot, please scan and email the completed copy to: joan@financialdivorceexpert.com. Thank you very much and we look forward to working with you.