

The Law Office of Norman Gregory Fernandez
Family Law
CLIENT INFORMATION QUESTIONNAIRE

I. PERSONAL FACTS

A. Name: _____
Address: _____

Telephone: Home __ () _____ Work __ () _____
Date of Birth: _____
Driver's License Number: _____
Social Security Number: _____

B. Spouse's Name (and AKA, if any): _____

Address: _____

Telephone: Home __ () _____ Work __ () _____
Date of Birth: _____
Driver's License Number: _____
Social Security Number: _____

C. Have you been a resident of California for the last six months and a resident of Los Angeles county for the last three months? _____
If not, please state your place of residence for the last six months:

D. Have any of your children under age 18 lived outside the State of California during the last five (5) years? _____

E. Have your children lived with any person other than you and/or your spouse?

(Yes or No) (Name of person with whom children lived and dates)

F. Are there any other pending legal proceedings concerning your children?

If yes, please complete:

Location of Court _____ Case No. _____

G. Child(ren)'s Names(s), Birthdate(s) and Place(s) of Birth:

1. _____
2. _____
3. _____
4. _____
5. _____

H. Date of Marriage/Place of Marriage: _____

I. Date of Separation: _____

II. PROPERTY

Please provide the information requested below to the best of your ability. Copies of documents evidencing ownership (deeds, escrow statements, passbooks, pinkslips, agreements, etc.) will be helpful. Please do not

be limited by the space below in supplying us with the information concerning your assets. Use separate paper where necessary.

A. Family Residence

1. Address _____
2. Form of Title (separate property, community property, joint tenancy, tenancy in common): _____
3. Date of Purchase or Acquisition: _____

4. Purchase Price: _____
5. Amount Borrowed at Time of Purchase: _____
6. Loan Balance as of Date of Separation: _____
7. Present Loan Balance: _____
8. Source of Funds for Purchase or Acquisition: _____
9. Source of Funds for Mortgage Payments: _____
10. Approximate Present Fair Market Value (attach appraisals, if available): _____

[Attach copies of deed(s), if available. Also, if more than one residence involved, please complete items 1 through 10 on separate paper for the other residence(s).]

B. Other Real Property and Commercial Property

1. Address _____
2. Form of Title (separate property, community property, joint tenancy, tenancy in common): _____
3. Date of Purchase or Acquisition: _____
4. Purchase Price: _____
5. Amount Borrowed at Time of Purchase: _____
6. Loan Balance as of Date of Separation: _____
7. Present Loan Balance: _____
8. Source of Funds for Purchase or Acquisition: _____
9. Source of Funds for Mortgage Payments: _____
10. Approximate Present Fair Market Value (attach appraisals, if available): _____

[Attach copies of deed(s), if available and any agreements pertaining to this property. Also, if more than one piece of property involved, for each such property, please complete items 1 through 10 on separate paper.]

C. Household Furniture, Furnishings and Fixtures:

1. Possession: _____
2. Items of Special Value: _____

3. Insured Items: _____

4. Items Acquired by Gift, Inheritance or Owned Before Marriage: _____

[Attach appraisals and/or inventory, if in existence]

D. Automobiles: Please supply year, make, model, license number, form of title, date of purchase, source of funds for downpayment and monthly payments, financing information (creditor, balance, etc.).

1. _____

2. _____

3. _____

[Attach copies of pink slips and purchase invoices, if available]

E. Life Insurance Policies: Please indicate name of company, type of policy, policy number, owner, beneficiary, face amount, and cash value.

1. _____

2. _____

3. _____

[Attach copies of policies and documents evidencing loans against policies, if any]

F. Bank Accounts and Certificates of Deposit: Please supply bank, branch, name and number of account, type of account, approximate balance and source of funds.

1. _____

2. _____

3. _____

[Attach copies of passbooks and most recent bank statements, if available]

G. Safe Deposit Boxes: Indicate bank, box number, persons who have access, description of contents.

1. _____

2. _____

3. _____

H. Business Interests: Indicate name, type of entity, nature of business, date started, other owners, partners, or shareholders percentage of interests, amount and source of funds invested.

1. _____

2. _____

I. Stocks and Bonds: Indicate description, number of shares, market value, location of certificates, source of funds and date acquired.

1. _____

2. _____

3. _____

J. Pension, Retirement, Profit Sharing Plans: Indicate name of employer, name of participant, value of interest, date started.

1. _____

2. _____

3. _____

K. Assets of Children: Indicate description of item(s), owner, value, and person in possession or control.

1. _____

2. _____

3. _____

L. Other Assets: Indicate description of item(s), source of funds and date acquired, person in possession and value.

1. _____

2. _____

3. _____

M. Separate Property: Separate property, as distinguished from community property, is generally described as the property you owned prior to your marriage or that was acquired by you during your marriage by gift, inheritance or with the income from your separate property.

Please indicate below which items described above you believe to be your separate property and your reasons for such belief. Attach continuation sheets if necessary.

III. OBLIGATIONS

Indicate all presently outstanding debts and obligations including date incurred, purpose, date due and terms of repayment. Include educational loans, which spouse obtained education, and amounts repaid during marriage education.

1. _____

2. _____

3. _____

4. _____

other than that involved in this proceeding

11. Other deductions (specify)

- a. _____ \$ _____ \$ _____
- b. _____ \$ _____ \$ _____
- c. _____ \$ _____ \$ _____

F. Present monthly income (if different from 12 month average) Please explain reason for difference \$ _____ \$ _____

v. LIQUID ASSETS

A. Liquid Assets Under Your Control

- 1. Cash \$ _____
- 2. Checking Accounts \$ _____
- 3. Stocks \$ _____
- 4. Bonds \$ _____
- 5. Life Insurance (cash value) \$ _____
- 6. Other \$ _____

B. Liquid Assets Under Spouse's Control

- 1. Cash \$ _____
- 2. Checking Accounts \$ _____
- 3. Stocks \$ _____
- 4. Bonds \$ _____
- 5. Life Insurance (cash value) \$ _____
- 6. Other \$ _____

VI. MONTHLY EXPENSES

Please list your monthly expenses as accurately as possible. A review of your check register, receipts and paid bills will help you to accumulate this list. Note that this is not a budget, but the actual amounts that you have been spending in recent months (perhaps prior to separation).

Please indicate the time period over which you have averaged the expenses. If you have been unable to spend money on certain items, e.g., clothes or entertainment in recent months, please indicate an estimate of the amounts spent during your marriage when funds were more readily available to make such expenditures.

If your spouse is meeting certain of the below expenses, please indicate the amount, following with SP (spouse pays). If your spouse is meeting such expense but you do not know the amount, indicate UNKSP (unknown-spouse pays). Where possible, attempt to segregate the expenses between you and your child(ren) with a slash (your share first, then the child(ren)'s).

A. List all persons living in your home whose expenses are included below and their income:

	Name	Age	Relationship	Gross Monthly Income
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____

List all other persons living in your home and their income:

Name	Age	Relationship	Gross Monthly Income
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1. _____
2. _____
3. _____

- B. Residence Payments You/Child(ren)
1. Rent/mortgage/deeds of trust _____
 2. Real property taxes and insurance _____

 3. Maintenance:
 - a. Repairs _____
 - b. Gardener _____
 - c. Housekeeping _____
 - d. Pool Service _____
 - e. Other _____
- C. Food at Home and Household Supplies _____
- D. Food Eating Out _____
- E. Utilities
1. Gas _____
 2. Electricity _____
 3. Water _____
 4. Garbage _____
 5. Cable T.V. _____
- F. Telephone _____
- G. Laundry and Cleaning _____
- H. Clothing
1. Client _____
 2. Child(ren) _____
 3. Shoes _____
 4. Shoe Repair _____
 5. Alterations _____
 6. Other _____
- I. Medical and Dental (Excluding portion covered by insurance)
1. Doctor _____
 2. Dentist/Orthodontist _____
 3. Optometrist _____
 4. Psychiatrist/Psychologist _____
 5. Drugs _____
 6. Other _____
- J. Insurance
1. Life _____
 2. Medical/Hospitalization _____
 3. Homeowner _____
 4. Disability _____

- 5. Personal Property _____
- 6. Other _____

K. Child Care

- 1. Nursery School _____
- 2. Babysitters _____
- 3. Day Care/After School Care _____
- 4. Nanny/LiveIn Caretaker _____
- 5. Summer Camp _____
- 6. Clubs _____

L. Education

- 1. Lessons _____
- 2. Tutors _____
- 3. Tuition _____
- 4. Books _____

- 5. Other _____

M. Entertainment and Vacations

- 1. Entertainment _____
- 2. Vacations (Prorate monthly) _____

N. Transportation and Auto Expense

- 1. Gas/Oil _____
- 2. Repairs/Maintenance _____
- 3. License _____
- 4. Auto Club _____
- 5. Car Wash _____
- 6. Auto Insurance _____
- 7. Parking _____
- 8. Public Transportation _____

O. Installment Payments _____

	Creditor's Name	Purpose	Monthly Payment	Balance as of Date of Separation	Present Balance
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____
6.	_____	_____	_____	_____	_____
7.	_____	_____	_____	_____	_____
8.	_____	_____	_____	_____	_____
9.	_____	_____	_____	_____	_____

P. Incidentals

- 1. Cigarettes _____
- 2. Cosmetics _____

- 3. Hair Care _____
- 4. Nail Care _____
- 5. Social and business dues _____
- 6. Subscriptions _____
- 7. Pets _____
- 8. Charitable/political contributions _____
- 9. Gifts _____

10. Furniture, appliance, etc. repair
or replacement _____
11. Jewelry/artwork _____
12. Other _____

Q. Support

1. Present marriage--child support _____
2. Prior marriage--child support _____
3. Present marriage--spousal support _____
4. Prior marriage--spousal support _____
5. Child(ren)'s allowance _____
6. Adult child support (specify
present or prior marriage) _____
7. Parental support _____