

KELLER LAW FIRM

310-545-1897 or 661-291-1631

INFORMATION ORGANIZER FOR YOUR PRE MARITAL OR POST MARITAL AGREEMENT

Date: _____ E-mail: _____

Home Phone: _____ Work Phone: _____

Legal Name _____ Date of Birth _____

Address _____

U.S. Citizen? _____ Social Security # _____

Occupation _____ Employer _____

Spouse's Legal Name _____ Date of Birth _____

U.S. Citizen? _____ Social Security # _____

Occupation _____ Employer _____

I. CHILDREN

A. Name _____ Birth Date _____

Check one: Natural? ___ Legally Adopted? ___ Foster? ___ Step? _____

Both? ___ You Only? ___ Spouse Only? ___ Social Security # _____

Address _____ Phone _____

B. Name _____ Birth Date _____

Check one: Natural? ___ Legally Adopted? ___ Foster? ___ Step? _____

Both? ___ You Only? ___ Spouse Only? ___ Social Security # _____

Address _____ Phone _____

C. Name _____ Birth Date _____

Check one: Natural? ___ Legally Adopted? ___ Foster? ___ Step? _____

Both? ___ You Only? ___ Spouse Only? ___ Social Security # _____

Address _____ Phone _____

D. Name _____ Birth Date _____

Check one: Natural? ___ Legally Adopted? ___ Foster? ___ Step? _____

Both? ___ You Only? ___ Spouse Only? ___ Social Security # _____

Address _____ Phone _____

How Many Grandchildren Do You Have? _____
Yours Only? _____ Your Spouse's Only? _____ Both? _____

II. FINANCIAL INFORMATION

1. REAL ESTATE

A. Description and Location _____

Titled in whose name? _____

Purchase Price _____ Current Value _____

Mortgage _____ Equity _____

B. Description and Location _____

Titled in whose name? _____

Purchase Price _____ Current Value _____

Mortgage _____ Equity _____

C. Description and Location _____

Titled in whose name? _____

Purchase Price _____ Current Value _____

Mortgage _____ Equity _____

2. BANK ACCOUNTS (Checking and Savings)

A. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

B. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

C. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

D. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

3. MONEY MARKET/CDs

A. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

B. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

C. Name of Institution _____ Account # _____

Titled In Whose Name _____ Account Balance _____

4. STOCKS, BONDS OR MUTUAL FUNDS

A. # of Shares _____ Description _____
Account # _____ Titled in Whose Name _____
Purchase Price _____ Current Value _____
B. # of Shares _____ Description _____
Account # _____ Titled in Whose Name _____
Purchase Price _____ Current Value _____

5. PROFIT SHARING, 401k, 403b, IRAs or PENSION PLANS

A. Description/Location/Name of Institution _____
Beneficiary _____ Current Value _____
B. Description/Location/Name of Institution _____
Beneficiary _____ Current Value _____
C. Description/Location/Name of Institution _____
Beneficiary _____ Current Value _____
D. Description/Location/Name of Institution _____
Beneficiary _____ Current Value _____

6. BUSINESS OR PARTNERSHIP LLC or CORPORATE INTERESTS

A. Name _____
Type of Ownership _____ Current Value _____
B. Name _____
Type of Ownership _____ Current Value _____
C. Name _____
Type of Ownership _____ Current Value _____

7. LIFE INSURANCE AND ANNUITIES

A. Name of Company _____ Policy Owner _____
1st Beneficiary _____ 2nd Beneficiary _____
Cash Value _____ Death Benefits _____
B. Name of Company _____ Policy Owner _____
1st Beneficiary _____ 2nd Beneficiary _____
Cash Value _____ Death Benefits _____
C. Name of Company _____ Policy Owner _____
1st Beneficiary _____ 2nd Beneficiary _____
Cash Value _____ Death Benefits _____

8. PERSONAL PROPERTY (Cars, Boats, Antiques, Jewelry, Coin Collections, etc.)

- | | |
|----------------------|---------------------|
| A. Description _____ | Approx. Value _____ |
| B. Description _____ | Approx. Value _____ |
| C. Description _____ | Approx. Value _____ |
| D. Description _____ | Approx. Value _____ |
| E. Description _____ | Approx. Value _____ |
| F. Description _____ | Approx. Value _____ |
| G. Description _____ | Approx. Value _____ |
| H. Description _____ | Approx. Value _____ |
| I. Description _____ | Approx. Value _____ |

9. PATENTS, COPYRIGHTS, OR TRADEMARKS? Describe _____

10. MINERAL RIGHTS? Describe _____

11. SAFE DEPOSIT BOX Location? _____

12. OTHER ASSETS? _____

13. Does anyone owe you any money? Or do you owe anyone money?
Explain _____

13. Total Value of Your Estate = \$ _____

III. DESIRED PROVISIONS
(To Be Discussed with Attorney)

Does Fiancé or Fiancée or Spouse have an Attorney?

Pre-Marital Property to be Separate?

Income from and Increase in Value of Pre-Marital Property to be Separate?

Income after Marriage to be Separate or Community?

How is Community Property to be created?

Allocation of Pre-Marital and Post-Marital debts?

Signing Bonus?

Will inheritances be kept Separate?

Income from and Increase in Value of Inheritances to be Separate?

Retirement Benefits to designate Spouse as Beneficiary?

Will or Trust for Spouse?

Spousal Support Payment Schedule or Waiver?

Last 3 Years of Income Tax Returns.

Disclosure of Assets, Debts and Income.