

FAMILY LAW FINANCIAL AGREEMENT

Information Questionnaire

YOUR DETAILS	You	Your Spouse (Fill in as much as you can)
Full Name (including middle name(s)):		
Residential Address:		
Postal Address: (if different from Residential Address)		
Telephone Number:	Mobile: Home: Business:	Mobile: Home: Business:
Email:		
Date of Birth:		
Occupation:		
Annual Salary:		
Employment status: (Full time/ Part time/ Unemployed)		
Employment type: (salaried employee/ business owner/ independent contractor)		

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PROFESSIONAL ADVISERS		
Do you have an Accountant ?	Name: Address: Contact Number: <input type="checkbox"/> Tick if you authorise us to contact them directly to obtain further details, if necessary	Name: Address: Contact Number:
Does your spouse have a lawyer ? If yes, please provide details.		Name: Address: Contact Number:

FAMILY DETAILS	
It is important to get a full picture of the persons within the family, including former spouses and children of previous marriages.	
Relationship Status	<input type="checkbox"/> Planning to live together <input type="checkbox"/> De facto <input type="checkbox"/> Planning to marry within 12 months <input type="checkbox"/> Married <input type="checkbox"/> Separated Please specify date of separation: _____ <input type="checkbox"/> Divorced Please specify date of divorce: _____
Length of your relationship (years)	
Do you or your partner have any Children?	<input type="checkbox"/> Yes GO TO NEXT QUESTION <input type="checkbox"/> No SKIP NEXT QUESTION

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YOUR CHILDREN

Please specify details of your children and your spouse's children, even if aged over 18.

Children's Details

Full Name (1):

Child of You Your Partner

Address (if under 18): Tick here if same as you

Age:

Date of Birth (if under 18):

Occupation:

Full Name (2):

Child of You Your Partner

Address (if under 18): Tick here if same as you

Age:

Date of Birth (if under 18):

Occupation:

Full Name (3):

Child of You Your Partner

Address (if under 18): Tick here if same as you

Age:

Date of Birth (if under 18):

Occupation:

Full Name (4):

Child of You Your Partner

Address (if under 18): Tick here if same as you

Age:

Date of Birth (if under 18):

Occupation:

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A. JOINT ASSETS			
Do you and your spouse have any joint assets? If yes, Please specify the details below			
Joint Property	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> (1) Address of property: Year of purchase: Purchase price: \$ Estimated gross value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No </td> <td style="width: 50%; vertical-align: top;"> (2) Address of property: Year of purchase: Purchase price: \$ Estimated gross value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No </td> </tr> </table>	(1) Address of property: Year of purchase: Purchase price: \$ Estimated gross value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No	(2) Address of property: Year of purchase: Purchase price: \$ Estimated gross value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No
(1) Address of property: Year of purchase: Purchase price: \$ Estimated gross value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No	(2) Address of property: Year of purchase: Purchase price: \$ Estimated gross value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No		
Jointly owned Vehicles	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> (1) Vehicle make & model: Registration No.: Estimated gross value: \$ </td> <td style="width: 50%; vertical-align: top;"> (2) Vehicle make & model: Registration No.: Estimated gross value: \$ </td> </tr> </table>	(1) Vehicle make & model: Registration No.: Estimated gross value: \$	(2) Vehicle make & model: Registration No.: Estimated gross value: \$
(1) Vehicle make & model: Registration No.: Estimated gross value: \$	(2) Vehicle make & model: Registration No.: Estimated gross value: \$		
Jointly owned Shares <small>(public listed)</small>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> (1) Company Name: No. of shares: Share price \$ as at / / Current value: \$ </td> <td style="width: 50%; vertical-align: top;"> (2) Company Name: No. of shares: Share price \$ as at / / Current value: \$ </td> </tr> </table>	(1) Company Name: No. of shares: Share price \$ as at / / Current value: \$	(2) Company Name: No. of shares: Share price \$ as at / / Current value: \$
(1) Company Name: No. of shares: Share price \$ as at / / Current value: \$	(2) Company Name: No. of shares: Share price \$ as at / / Current value: \$		
Jointly owned Managed funds	Name of fund manager: Current value: \$		
Joint Bank Accounts	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> (1) Bank: Acct No.: Acct Name: Balance: \$ As at date: / / </td> <td style="width: 50%; vertical-align: top;"> (2) Bank: Acct No.: Acct Name: Balance: \$ As at date: / / </td> </tr> </table>	(1) Bank: Acct No.: Acct Name: Balance: \$ As at date: / /	(2) Bank: Acct No.: Acct Name: Balance: \$ As at date: / /
(1) Bank: Acct No.: Acct Name: Balance: \$ As at date: / /	(2) Bank: Acct No.: Acct Name: Balance: \$ As at date: / /		
Joint household effects	Brief description: Estimated value: \$		
Other Joint Assets <small>(eg business, Family Trust):</small>	Details: Estimated value: \$		
Total of Joint Assets	\$		

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B. INDIVIDUAL ASSETS

Do you or your spouse have **individually owned** assets? If yes, please specify the details below.

List **all** assets, even if obtained after separation. Mark "to be advised" if unsure.

	You	Your Spouse
Property	Address of property: Year of purchase: Purchase price: \$ Estimated current value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No	Address of property: Year of purchase: Purchase price: \$ Estimated current value: \$ Value agreed by spouse? Yes / No Have you obtained a valuation? Yes / No
Vehicles	Vehicle make & model: Registration No.: Estimated current value: \$	Vehicle make & model: Registration No.: Estimated current value: \$
Shares <small>(public listed)</small>	Company Name: No. of shares: Share price \$ as at / / Current value: \$	Company Name: No. of shares: Share price \$ as at / / Current value: \$
Managed funds	Fund manager: Current value: \$	Fund manager: Current value: \$
Bank Accounts	Bank: Acct No.: Acct Name: Balance: \$ As at date: / /	Bank: Acct No.: Acct Name: Balance: \$ As at date: / /
Superannuation	Name of fund: Current balance: \$	Name of fund: Current balance: \$
Life Insurance	Name of fund: Insured sum: \$	Name of fund: Insured sum: \$

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B. INDIVIDUAL ASSETS – continued		
Household & personal effects	Brief description: Estimated value: \$	Brief description: Estimated value: \$
Other assets (eg business):	Details: Estimated value: \$	Details: Estimated value: \$
Total Individual Assets	\$	\$

C. PRIVATE COMPANIES		
Do you or your spouse have any companies in your own names? If yes, please specify the details below. Please include a copy of the most recent financial statement Mark "to be advised" if unsure.		
	You	Your Spouse
Name		
A.C.N		
Directors		
Shareholders' names		
Your % shareholding		
Assets	\$	\$
Liabilities	\$	\$
Net value of your shareholding	\$	\$

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D. PRIVATE TRUSTS

Do you or your spouse have any trusts established? If yes, please specify the details below.
Please include a copy of any Trust Deeds Mark "to be advised" if unsure.

	You	Your Spouse
Name		
Type of trust		
Trustee		
Primary Beneficiaries of Trust		
Assets	\$	\$
Liabilities	\$	\$
Net Trust Assets	\$	\$

A. JOINT LIABILITIES

Do you and your spouse have any joint liabilities? If yes, Please specify the details below

Joint Mortgages	(1) Bank/lender: Current owing: \$ As at date: / /	(2) Bank/lender: Current owing: \$ As at date: / /
Joint Credit Cards	(1) Bank/lender: Current owing: \$ As at date: / /	(2) Bank/lender: Current owing: \$ As at date: / /
Joint Finance Agreements (e.g. car loan)	Bank/lender: Details of vehicle/asset covered Current owing: \$ As at date: / /	
Other Joint Debts	Lender: Nature of debt: Current owing: \$ As at date: / /	
Total of Joint Liabilities	\$	

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B. INDIVIDUAL LIABILITIES		
Do you and your spouse have <u>individual</u> liabilities? If yes, please specify the details below. List all liabilities, even if arising after separation. Mark "to be advised" if unsure.		
	You	Your Spouse
Mortgages	Bank/lender: Current owing: \$ As at date: / /	Bank/lender: Current owing: \$ As at date: / /
Credit Cards	Bank/lender: Current owing: \$ As at date: / /	Bank/lender: Current owing: \$ As at date: / /
Finance Agreements (e.g. car loan)	Bank/lender: Vehicle/asset covered: Current owing: \$ As at date: / /	Bank/lender: Vehicle/asset covered: Current owing: \$ As at date: / /
Other Individual Debts	Lender: Nature of debt: Current owing: \$	Lender: Nature of debt: Current owing: \$
Total of Individual Liabilities	\$	\$

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TOTAL NET ASSETS	
A. Total Joint Assets listed above:	\$
B. Total Individual Assets (You and your Spouse):	\$
C. Private Companies - net value of your shareholding (You and your Spouse)	\$
D. Private Trusts – net Trust assets (You and your Spouse)	\$
Subtotal of all assets: A + B + C + D =	\$
A. Total Joint Liabilities:	\$
B. Total Individual Liabilities (You and your Spouse):	\$
Subtotal of liabilities: A + B =	\$
Total Net Assets: Subtotal of assets – Subtotal of liabilities =	\$

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FINANCIAL CONTRIBUTIONS		
Describe in your own words the contributions that you and your spouse have made to the Total Net Assets above. Mark "not applicable" where irrelevant.		
	You	Your Spouse
Which of the Total Net Assets were owned by you or your spouse individually before the relationship?		
Years (in total) that you worked full time during the relationship		
Years (in total) that you worked part time		
Years (in total) that you did not work		
What financial contribution has each of you made during the relationship to building up the Total Net Assets?	Small / equal / large Give details:	Small / equal / large Give details:
Were any of the Total Net Assets received by you or your spouse as a gift during the relationship?	Yes / No Give details:	Yes / No Give details:
Other details regarding the contributions you have made to the Total Net Assets		

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NON-FINANCIAL CONTRIBUTIONS		
Describe in your own words the non-financial contributions that you and your spouse have made during your relationship (or indicate if "not applicable")		
	Your Contribution	Your Spouse's Contribution
Household Chores	Small / equal / large Give details:	Small / equal / large Give details:
Caring for children	Small / equal / large Give details:	Small / equal / large Give details:
Maintenance and improvements to assets (e.g. repairs, painting, landscaping, odd jobs)	Small / equal / large Give details:	Small / equal / large Give details:
Other non-financial support (e.g. bookwork, unpaid help)	Small / equal / large Give details:	Small / equal / large Give details:

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YOUR FINANCIAL RESOURCES		
Please provide the following further information for you and your spouse. Mark "to be advised" if unsure.		
	You	Your Spouse
Are you currently able to financially support yourself?	Yes / No Give details:	Yes / No Give details:
Do you need to support children or other dependents?	Yes / No Give details:	Yes / No Give details:
Are you receiving child support?	Yes / No Give details:	Yes / No Give details:
Are you receiving financial support from another source (e.g. a new partner)?	Yes / No Give details:	Yes / No Give details:
Are you expecting to receive an inheritance from a deceased estate, compensation payout or other significant sum?	Yes / No Give details:	Yes / No Give details:

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YOUR PROPERTY SETTLEMENT

Please provide the following further information for you and your spouse.
Mark "to be advised" if unsure.

Have you and your spouse agreed upon the terms of a property settlement?

Yes / No
If yes, provide details of the agreed terms on an attached separate sheet.

If no, what are the assets that you wish to retain?

What are the assets that your spouse wishes to retain?

What are the current points of disagreement?

List any other objectives or issues

Signed:

Client Full Name

Date: / /