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* BOARD CERTIFIED
ESTATE PLANNING & PROBATE LAW
TEXAS BOARD OF LEGAL SPECIALIZATION

MARITAL PROPERTY AGREEMENT QUESTIONNAIRE

In response to your contact with our office regarding preparation of a Marital Property Agreement in anticipation of your upcoming marriage, enclosed herein please find a questionnaire for you to complete in preparation for your appointment.

The completion of this questionnaire prior to your appointment will enable us to better serve you in a more timely and professional manner. If there is other information that we need, we will cover that at our initial office conference.

You will need to bring the following documents with you, if available:

1. Copy of Warranty Deeds on all real estate;
2. Copy of any Promissory Notes or Deeds of Trust on real estate;
3. Copy of statements on tax deferred accounts (401K, IRA, etc.);
4. Copy of current brokerage account statements;
5. Copy of current mutual fund statements;
6. Copy of any stock certificates or other dividend reinvestment plan;
7. Copy of current bank statements for all accounts; and
8. Copy of titles to any vehicles.

We appreciate the opportunity to be of service to you in this matter.

Leach & Fox - Attorneys at Law, P.C.

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Date _____

MARITAL PROPERTY AGREEMENT INFORMATION SHEET

Full Name: _____

Home Address: _____

Home Phone: _____ Fax/Pager/Mobile _____

Employer: _____ Work Phone: _____

Fax: _____

SS No.: _____ D.O.B.: _____

Date of Anticipated Marriage: _____

Date of Texas Residence Established: _____ U.S. Citizen: Y/N

Children:

	Name	Address	Age
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

FUTURE SPOUSE'S INFORMATION SHEET

Future Spouse:

Full Name: _____

Home Address: _____

Home Phone: _____ Fax/Pager/Mobile _____

Employer: _____ Work Phone: _____
Fax: _____

SS No.: _____ D.O.B.: _____

Date of Texas Residence Established: _____ U.S. Citizen: Y/N

Children:

	Name	Address	Age
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

YOUR ASSET INFORMATION

Real Estate:

	Address:	Mortgage balance:	Ownership on Warranty Deed:	Current Value:
1.	_____	\$ _____	_____	\$ _____

2.	_____	\$ _____	_____	\$ _____

3.	_____	\$ _____	_____	\$ _____

Life Insurance:

	Insurance Company:	Type (term, whole life, universal or variable):	Beneficiary:	Cash Value:	Death Benefit:
1.	_____	_____	_____	\$ _____	\$ _____
2.	_____	_____	_____	\$ _____	\$ _____
3.	_____	_____	_____	\$ _____	\$ _____

Tax Deferred Assets:

	401K or IRA and Name of Company:	Primary Beneficiary:	Current Value:
1.	_____	_____	\$ _____
2.	_____	_____	\$ _____
3.	_____	_____	\$ _____
4.	_____	_____	\$ _____

Brokerage Accounts:

	Name of Brokerage Co.:	Acct. #:	Name shown on Account:	Advisor & Phone #:	Current Value:
1.	_____	_____	_____	_____	\$ _____
			_____	Ph.# _____	
2.	_____	_____	_____	_____	\$ _____
			_____	Ph.# _____	
3.	_____	_____	_____	_____	\$ _____
			_____	Ph.# _____	

Mutual Funds:

	Name of Fund:	Acct. #:	Name shown on Account:	Current Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____
4.	_____	_____	_____	\$ _____

Stocks & Bonds (held outside of brokerage account):

	Name of Company:	Number of Shares or Amount of Bond:	Name shown on Certificate:	Current Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____
4.	_____	_____	_____	\$ _____

U.S. Savings Bonds:

Number of bonds: _____ Face Value: \$ _____ Series: _____

Name shown on bond: _____

Bank Accounts:

	Name of Bank:	Acct. #:	Acct. type (CD, checking, savings):	Name on Account:	Current Value:
1.	_____	_____	_____	_____	\$ _____
2.	_____	_____	_____	_____	\$ _____
3.	_____	_____	_____	_____	\$ _____

Vehicles:

	Year:	Make:	VIN:	Name on Title:	Value:
1.	_____	_____	_____	_____	\$ _____
2.	_____	_____	_____	_____	\$ _____

Businesses:

	Name of Business	Type (corp., partnership, sole proprietorship)	Percentage of Ownership:	Current buy-sell agreement?
1.	_____	_____	_____ %	Yes or No
2.	_____	_____	_____ %	Yes or No

Tangible Personal Property:

	Item Description (Provide Separate list if needed):	Value:
1.	_____	_____
2.	_____	_____
3.	_____	_____

Liabilities (Debts):

	Item Description:	Amount:
1.	_____	_____
2.	_____	_____
3.	_____	_____

FUTURE SPOUSE'S ASSET INFORMATION

Real Estate:

	Address:	Mortgage balance:	Ownership on Warranty Deed:	Current Value:
1.	_____	\$ _____	_____	\$ _____

2.	_____	\$ _____	_____	\$ _____

3.	_____	\$ _____	_____	\$ _____

Life Insurance:

	Insurance Company:	Type (term, whole life, universal or variable):	Beneficiary:	Cash Value:	Death Benefit:
1.	_____	_____	_____	\$ _____	\$ _____
2.	_____	_____	_____	\$ _____	\$ _____
3.	_____	_____	_____	\$ _____	\$ _____

Tax Deferred Assets:

	401K or IRA and Name of Company:	Primary Beneficiary:	Current Value:
1.	_____	_____	\$ _____
2.	_____	_____	\$ _____
3.	_____	_____	\$ _____
4.	_____	_____	\$ _____

Brokerage Accounts:

	Name of Brokerage Co.:	Acct. #:	Name shown on Account:	Advisor & Phone #:	Current Value:
1.	_____	_____	_____	_____	\$ _____
			_____	Ph.# _____	
2.	_____	_____	_____	_____	\$ _____
			_____	Ph.# _____	
3.	_____	_____	_____	_____	\$ _____
			_____	Ph.# _____	

Mutual Funds:

	Name of Fund:	Acct. #:	Name shown on Account:	Current Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____
4.	_____	_____	_____	\$ _____

Stocks & Bonds (held outside of brokerage account):

	Name of Company:	Number of Shares or Amount of Bond:	Name shown on Certificate:	Current Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____
4.	_____	_____	_____	\$ _____

U.S. Savings Bonds:

Number of bonds: _____ Face Value: \$ _____ Series: _____
Name shown on bond: _____

Bank Accounts:

	Name of Bank:	Acct. #:	Acct. type (CD, checking, savings):	Name on Account:	Current Value:
1.	_____	_____	_____	_____	\$ _____
2.	_____	_____	_____	_____	\$ _____
3.	_____	_____	_____	_____	\$ _____

Vehicles:

	Year:	Make:	VIN:	Name on Title:	Value:
1.	_____	_____	_____	_____	\$ _____
2.	_____	_____	_____	_____	\$ _____

Businesses:

	Name of Business	Type (corp., partnership, sole proprietorship)	Percentage of Ownership:	Current buy-sell agreement?
1.	_____	_____	_____ %	Yes or No
2.	_____	_____	_____ %	Yes or No

Tangible Personal Property:

	Item Description (Provide Separate list if needed):	Value:
1.	_____	_____
2.	_____	_____
3.	_____	_____

Liabilities (Debts):

	Item Description:	Amount:
1.	_____	_____
2.	_____	_____
3.	_____	_____

