

MATRIMONIAL INTERVIEW SHEET

Date: \_\_\_\_\_

If you were referred to this firm by any person, please write in the name and address, if known, of said person so we may send a thank you letter.

Referred by: \_\_\_\_\_

Your Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Home Phone # \_\_\_\_\_ Cell # \_\_\_\_\_

Business Phone # \_\_\_\_\_ Years NJ Resident: \_\_\_\_\_

Spouse's Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_

\_\_\_\_\_

Years NJ Resident: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_

Place of Marriage: \_\_\_\_\_

Prior Marriage Information:

Client: Previously Married: Yes \_\_\_\_\_ No \_\_\_\_\_

How terminated: Widowed \_\_\_\_\_ Divorced \_\_\_\_\_ (State \_\_\_\_\_)

Spouse: Previously Married: Yes \_\_\_\_\_ No \_\_\_\_\_

How terminated: Widowed \_\_\_\_\_ Divorced \_\_\_\_\_ (State \_\_\_\_\_)

Children:

Full Name	Birth Date	Living With	(if any) Medical Problems	School & Year
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_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Date of Separation: \_\_\_\_\_

Client's Employment:

Name and Address of Employer: \_\_\_\_\_

\_\_\_\_\_

Job Title: \_\_\_\_\_ Employed Since: \_\_\_\_\_

Duties: \_\_\_\_\_

Compensation: Prior Calendar Year \_\_\_\_\_

                    This Year to Date \_\_\_\_\_

Basis (Salary, Bonus, Commission, etc.): \_\_\_\_\_

\_\_\_\_\_

Perquisites: \_\_\_\_\_

\_\_\_\_\_

Prior Employment Information: \_\_\_\_\_

\_\_\_\_\_



Assets and Liabilities:

Address: \_\_\_\_\_

First Mortgage: \_\_\_\_\_

Loan Number: \_\_\_\_\_

Date Acquired: \_\_\_\_\_

Source of Money to Acquire: \_\_\_\_\_

Address: \_\_\_\_\_

Second Mortgage: \_\_\_\_\_

Loan Number: \_\_\_\_\_

Date Acquired: \_\_\_\_\_

Source of Money to Acquire: \_\_\_\_\_

Bank Accounts, CDs, money market funds, etc.: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Securities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Life Insurance Cash Value: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Personal Effects, Furniture, Autos, Collections, etc.: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Pension/Profit Sharing/Deferred Comp/Keoughs/IRAs: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Business: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other Assets: \_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

Liabilities: \_\_\_\_\_

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Should creditors be notified? \_\_\_\_\_

Revision of will? \_\_\_\_\_

Access to savings account book and other pertinent documents and records: \_\_\_\_\_

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Custody dispute? \_\_\_\_\_

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Client's story: \_\_\_\_\_

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Fee Arrangement: \_\_\_\_\_

