

**STATUTORY CRITERIA SUMMARY**

Date of marriage: \_\_\_\_/\_\_\_\_/\_\_\_\_

Marriage # for Wife (1<sup>st</sup>, 2<sup>nd</sup>, etc.):\_\_\_\_; Marriage # for Husband (1<sup>st</sup>, 2<sup>nd</sup>, etc.): \_\_\_\_\_:

Wife's date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_; Husband's date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Wife's occupation: \_\_\_\_\_

Husband's occupation: \_\_\_\_\_

Ages of children: \_\_\_\_\_

Children's special needs: \_\_\_\_\_

Value of assets currently in Wife's name: \$ \_\_\_\_\_

Value of assets in Wife's name at time of marriage: \$ \_\_\_\_\_

Value of assets currently in Husband's name: \$ \_\_\_\_\_

Value of assets in Husband's name at time of marriage: \$ \_\_\_\_\_

Value of jointly owned assets: \$ \_\_\_\_\_

Wife's employer: \_\_\_\_\_

Wife's current total annual compensation (salary/wages/commissions/bonus): \$ \_\_\_\_\_

Wife's current total annual compensation over the past 3 calendar years: \$ \_\_\_\_\_

If Wife is self-employed, business's gross revenue/net profit from last filed tax return:

\$ \_\_\_\_\_ (gross revenue) /\$ \_\_\_\_\_ (net revenue)

Husband's employer: \_\_\_\_\_

Husband's current total annual compensation (salary/wages/commissions/bonus): \$ \_\_\_\_\_

Husband's current total annual compensation over the past 3 calendar years: \$ \_\_\_\_\_

If Husband is self-employed, business's gross revenue/net profit from last filed tax return:

\$ \_\_\_\_\_ (gross revenue) /\$ \_\_\_\_\_ (net revenue)

Combined annual unearned income (interest, dividends, etc.) \$ \_\_\_\_\_/yr.

Other expected future sources of income or property such as trusts (source & est. amount):

Wife: \_\_\_\_\_ \$ \_\_\_\_\_

Husband: \_\_\_\_\_ \$ \_\_\_\_\_

Amounts inherited during marriage – Husband: \$ \_\_\_\_\_; Wife: \$ \_\_\_\_\_

Significant health issues:

Wife: \_\_\_\_\_

\_\_\_\_\_

Husband: \_\_\_\_\_

Educational Level including degrees and dates:

Wife: \_\_\_\_\_

Husband: \_\_\_\_\_

If applicable, length of time currently out of the workforce: Wife: \_\_\_\_\_ Husband: \_\_\_\_\_

Do you have a prenuptial agreement? \_\_\_\_\_ If so, when was it signed? \_\_\_\_\_

Which if either spouse has been primarily responsible for child-raising? \_\_\_\_\_

Reasons for breakdown of marriage:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Your concerns or contentions, if any, re: income (for example, you may lose your job; your spouse is understating or voluntarily reducing his/her income; etc.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Your concerns or contentions, if any, re: assets & liabilities (for example, possibility of losing your home; you believe your spouse is disposing of assets; your debts are too high; etc.)

\_\_\_\_\_  
\_\_\_\_\_

Specific events or conversations that you feel may impact support or property distribution:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other factors (not mentioned above) that you feel may impact resolution of financial issues:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

