

# CLIENT INTERVIEW SHEET

\* DIVORCE NO CHILDREN \*

WHERE DID YOU HEAR ABOUT US?

DATE: \_\_\_\_\_, 2006

\_\_\_ Drove by Office  
\_\_\_ Transwestern (cover: Colleyville City Hall )

\_\_\_ SWB NETC (cover: Grapevine Grapefest)  
\_\_\_ Internet

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

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

Have you ever heard of Collaborative Law?  Yes  No

Was Board Certification a reason you choose this office?  Yes  No

**IT IS THE POLICY OF THIS FIRM TO PREPARE AND ENTER INTO A WRITTEN FEE AGREEMENT WITH EACH CLIENT ON A CASE BY CASE BASIS PRIOR TO ACCEPTING REPRESENTATION UNLESS WAIVED BY THE ATTORNEY IN WHOLE OR IN PART. YOU WILL BE CHARGED ON AN HOURLY BASIS FOR INITIAL CONSULTATIONS AS WELL AS OTHER REQUESTED SERVICES PROVIDED TO YOU PRIOR TO ENTRY OF A WRITTEN FEE AGREEMENT.**

CHECK HERE \_\_\_\_\_ IF YOU HAVE **NOT LIVED** IN TARRANT COUNTY FOR THE PAST 6 MONTHS.

YOUR FULL NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY/ZIP \_\_\_\_\_

SOCIAL SECURITY #: \_\_\_\_\_ DRIVER'S LICENSE # \_\_\_\_\_

HOME PHONE #: \_\_\_\_\_ WORK PHONE #: \_\_\_\_\_ E-MAIL \_\_\_\_\_

PAGER # \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_ PLACE OF BIRTH: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_ POSITION \_\_\_\_\_

FULL ADDRESS: \_\_\_\_\_ HOURS: \_\_\_\_\_

LENGTH OF TIME EMPLOYED BY THIS EMPLOYER: \_\_\_\_\_

GROSS SALARY/MONTH: \$ \_\_\_\_\_ NET SALARY/MO. \$ \_\_\_\_\_

HIGHEST LEVEL OF EDUCATION (DEGREES, ETC) \_\_\_\_\_

SPOUSE'S FULL NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY/ZIP \_\_\_\_\_

SOCIAL SECURITY # \_\_\_\_\_ DRIVER'S LICENSE # \_\_\_\_\_

HOME PHONE # \_\_\_\_\_ WORK PHONE # \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ PLACE OF BIRTH: \_\_\_\_\_

EMPLOYER: \_\_\_\_\_ POSITION \_\_\_\_\_

STREET/CITY/STATE: \_\_\_\_\_

HOW LONG EMPLOYED BY THIS EMPLOYER? \_\_\_\_\_

GROSS SALARY/MONTH: \$ \_\_\_\_\_ NET SALARY/MO. \$ \_\_\_\_\_

HIGHEST LEVEL OF EDUCATION (DEGREES, ETC) \_\_\_\_\_

Are there any deductions from either parties paycheck other than FICA and WH? If so, please explain.

**MARRIAGE & SEPARATION:**

Date of marriage: \_\_\_\_\_ Place of marriage (city/state) \_\_\_\_\_ Date of separation: \_\_\_\_\_

Check as appropriate if your marital difficulties involve any of the following:

- DRUGS
- ALCOHOL
- SEXUAL DISAPPOINTMENT
- INTERNET USAGE
- SEXUAL INFIDELITY
- FINANCIAL DISPUTES
- RELIGION
- PHYSICAL VIOLENCE
- MENTAL ABUSE
- INCOMPATIBILITY
- PROBLEMS WITH STEP CHILDREN
- OTHER:(Explain) \_\_\_\_\_

Is your spouse aware that you wish to file for divorce? \_\_\_\_\_  
 Have you been married before? \_\_\_\_\_ if so, how many times? \_\_\_\_\_ Is wife pregnant? \_\_\_\_\_  
 Wife's maiden name \_\_\_\_\_  
 Do you wish a change of name? If so, print the full name you are requesting \_\_\_\_\_

**PROPERTY:**

Are you renting or buying your home?  Renting  Buying  
 Name of mortgage company \_\_\_\_\_ Estimated fair market value of property \$ \_\_\_\_\_  
 Year purchased \_\_\_\_\_ Purchase price \$ \_\_\_\_\_ Mortgage balance \$ \_\_\_\_\_  
 List any additional real estate property owned, give estimated fair market Value And Name of mortgage company, year bought, mortgage balance, and monthly payments:  
 \_\_\_\_\_  
 \_\_\_\_\_

Have either you or your spouse received any large gifts or inheritance during the marriage? \_\_\_\_\_  
 If so, please explain: \_\_\_\_\_

**VEHICLES**

List any motor vehicles, boats, airplanes, cycles, trailers: (year & model)

1) Vehicle (list year and model): \_\_\_\_\_ who drives? \_\_\_\_\_  
 Financed with \_\_\_\_\_  
 Value of vehicle \$ \_\_\_\_\_ Payment per month \$ \_\_\_\_\_  
 Year purchased \_\_\_\_\_ Payoff amount on loan \$ \_\_\_\_\_

2) Vehicle (list year and model): \_\_\_\_\_ who drives? \_\_\_\_\_  
 Financed with \_\_\_\_\_  
 Value of vehicle \$ \_\_\_\_\_ Payment per month \$ \_\_\_\_\_  
 Year purchased \_\_\_\_\_ Payoff amount on loan \$ \_\_\_\_\_

3) Vehicle (list year and model): \_\_\_\_\_ who drives? \_\_\_\_\_  
 Financed with \_\_\_\_\_  
 Value of vehicle \$ \_\_\_\_\_ Payment per month \$ \_\_\_\_\_  
 Year purchased \_\_\_\_\_ Payoff amount on loan \$ \_\_\_\_\_

**FINANCIAL**

Please list any and all bank accounts, savings accounts, CDs, IRAs, credit unions, or savings bonds: give name of bank or financial institutions, who is authorized to withdraw funds (i.e. (h) husband, (w) wife, or (j) joint-circle one), amount in account, and type of account. List everything owned by either party:

<u>BANK OR INSTITUTION</u>	<u>TYPE OF ACCOUNT</u>	<u>AMOUNT</u>
_____ h w j	_____	\$ _____
_____ h w j	_____	\$ _____
_____ h w j	_____	\$ _____
_____ h w j	_____	\$ _____

**DEBTS:**

<u>(INCLUDE HOUSE &amp; AUTO)</u>	<u>MIN. MTHLY PAYMENT</u>	<u>TOTAL DUE</u>	<u>WHO IS PAYING THIS DEBT?</u>
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

**RETIREMENT**

Amount of retirement, profit-sharing, or other employee benefits you and your spouse have if you left employment today?

Client: lump sum \$ \_\_\_\_\_

Is there an annuity?  Yes  No

Spouse: lump sum \$ \_\_\_\_\_

**ALTERNATE CONTACT**

Alternate person to contact \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Relationship to you: \_\_\_\_\_

**ATTORNEYS:**

If you have consulted with another attorney on this matter, please give attorney's name: \_\_\_\_\_

Does your spouse now have an attorney? \_\_\_\_\_ If so, please give attorney's name: \_\_\_\_\_

**COUNSELING:**

Have you and your spouse sought marriage counseling? \_\_\_\_\_ if so, with whom? \_\_\_\_\_

Is your spouse willing to participate in counseling? \_\_\_\_\_

Is there one particular incident which prompted your visit today? If so, please explain briefly:

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

Are you definitely seeking a divorce or do you just need general information regarding your rights?

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

What do you like to do in your spare time? \_\_\_\_\_

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