

CLIENT INTERVIEW SHEET

CLIENT NAME: _____

DATE: _____

INSTRUCTIONS: Please complete this questionnaire. If you will spend the time to complete all items, you will give us the background information necessary to begin to understand the complexity of the personal aspects of your family law problem. All information will be held in strict confidence.

NOTICE: Pursuant to Texas Rule of Civil Procedure 192.5 along with all corresponding Rules of Evidence associated therewith, the information contained within this document comprise the work product of the attorney whose client name is referenced above. All information herein has been prepared in anticipation of litigation or for trial by or for a party or a party's representatives, including the party's attorneys, consultants, sureties, indemnitors, insurers, employees, or agents.

Referral

Who referred you to this office?

_____ : My friend whose name is _____.

_____ : An Attorney whose name is _____.

_____ : Internet Search Engine/Web Site _____.

Web Site Comments

If you visited our web site, please list any comments you have regarding user friendliness or improvements we might make:

NOTE: THE FOLLOWING INFORMATION REQUESTED MAY OR MAY NOT APPLY TO YOUR PERSONAL SITUATION. WE REALIZE THAT YOU MAY NOT HAVE ACCESS TO ALL OF THE REQUESTED INFORMATION AT THE OUTSET OF THE CASE, BUT IDENTIFICATION OF WHAT INFORMATION IS NEEDED TO PROSECUTE YOUR CASE WILL ENSURE COMPLETENESS. ATTACH ADDITIONAL SHEETS OF PAPER IF ENOUGH SPACE IS NOT PROVIDED.

1. Please give your full name, date and place of birth, Social Security number, and drivers license number:

a. Name : _____

Maiden Name : _____

b. Date of Birth : _____

c. Place of Birth : _____

d. Social Security : _____

e. Driver's License # : _____

2. Where are you living now?

- a. Street Address : _____
- b. City : _____
- c. State & Zip Code : _____
- How long in State : _____
- d. County of Residence : _____
- e. How long in County : _____
- f. Residence telephone : _____
- g. Mobile telephone : _____
- h. Email Address : _____

3. Please complete the following concerning your employment:

- i. Employer : _____
- j. Job title : _____
- k. Full address : _____
- l. Telephone number : _____
- m. Gross salary/monthly : _____
- n. Annual gross (including bonuses, Stock options, etc.) : _____
- o. Length of employment : _____
- p. Education/Training : _____

4. Please give your spouse's full name, date and place of birth, Social Security number, drivers license number:

- a. Name : _____
- Maiden Name : _____
- b. Date of Birth : _____
- c. Place of Birth : _____
- d. Social Security : _____
- e. Driver's License # : _____

5. Where is your spouse living and what is your spouse's telephone number?

- a. Street Address : _____

- b. City : _____
- c. State & Zip Code : _____

6. Please complete the following concerning your spouse's employment:

- 1. Employer : _____
- 2. Job title : _____
- 3. Full address : _____
- 4. Telephone number : _____
- 5. Gross salary/monthly : _____
- 6. Annual gross (including bonuses, Stock options, etc.) : _____

7. State & Zip Code : _____

7. Please give the date and place of your marriage:

a. Date : _____

b. City, State : _____

8. Date of separation : _____

9. Enter name of Marriage Counselor, if applicable.

: _____

10. If there are any children of this marriage, thoroughly answer all questions.

Child #1

a. Name of Child : _____

b. Sex of Child : _____

c. Date of Birth : _____

d. Place of Birth : _____

e. Social Security : _____

f. Disability, if any : _____

g. Child's Address : _____

h. Driver's License # : _____

Child #2

a. Name of Child : _____

b. Sex of Child : _____

c. Date of Birth : _____

- d. Place of Birth : _____
- e. Social Security : _____
- f. Disability, if any : _____
- g. Child's Address : _____
- h. Driver's License # : _____

Child #3

- a. Name of Child : _____
- b. Sex of Child : _____
- c. Date of Birth : _____
- d. Place of Birth : _____
- e. Social Security : _____
- f. Disability, if any : _____
- g. Child's Address : _____
- h. Driver's License # : _____

11. Will there be a dispute over custody of the children? _____
 If not, who will have custody? _____

a. List all property (other than furniture and clothing) owned by the children.
 : _____
 : _____

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

- _____ Drugs/alcohol
- _____ Sexual disappointment
- _____ Sexual infidelity
- _____ Financial dispute
- _____ Physical violence
- _____ Religion
- _____ Incompatibility
- _____ Other _____

13. Have you or your spouse ever filed for a divorce? _____
 If so, when and where? _____

14. Does your spouse now have an attorney? _____
 If so, whom? _____

15. If a divorce is granted, should the wife's maiden or prior name be restored? _____
If so, what name will be used? _____

16. Do you pay or receive child support? _____
Describe Child Support payments. _____ per _____

17. Does your Spouse pay or receive child support? _____
Describe Child Support payments. _____ per _____

18. Please list all Real Estate Property:

Real Estate Property #1

a. Address : _____

b. Legal Description : _____

: _____

: _____

c. Mortgage Company : _____

Amount of original note: _____

Note executed by : _____

Date of original note : _____

d. Year bought : _____

e. Estimate Current Mkt. value : _____

f. Monthly payments : _____

g. General Comments : _____

Real Estate Property #2

a. Address : _____

b. Legal Description : _____

: _____

: _____

c. Mortgage Company : _____

Amount of original note : _____

Note executed by : _____

Date of original note : _____

d. Year bought : _____

e. Estimate Current Mkt. value : _____

f. Monthly payments : _____

g. General Comments : _____

19. List all Bank Accounts, Savings Accounts, C.D.'s, Credit Union, Savings bonds:

Account #1

- a. Name of Bank : _____
Address : _____
- b. Account type & # : _____
(checking, savings, IRA, etc.) : _____
- c. Amount on deposit : _____
- d. Authorized users : _____

Account #2

- a. Name of Bank : _____
Address : _____
- b. Account type & # : _____
(checking, savings, IRA, etc.) : _____
- c. Amount on deposit : _____
- d. Authorized users : _____

Account #3

- a. Name of Bank : _____
Address : _____
- b. Account type & # : _____
(checking, savings, IRA, etc.) : _____
- c. Amount on deposit : _____
- d. Authorized users : _____

20. List all Motor vehicles, Boats, Airplanes, Cycles, Trailers:

Vehicle #1

- a. Year and Model : _____
- b. Vehicle ID Number : _____
- c. Who drives the vehicle : _____
- d. Lien with : _____
Address : _____
Loan Balance : _____

Vehicle #2

- a. Year and Model : _____
- b. Vehicle ID Number : _____
- c. Who drives the vehicle : _____
- d. Lien with : _____
Address : _____
Loan Balance : _____

21. List all Retirement, Pensions, and Savings Plans.

- a. Do you participate in any retirement plan? _____
If so, describe the plan: _____

- b. Does your Spouse participate in any retirement plan? _____
If so, describe the plan : _____

- c. Do you participate in any company savings plan? _____
How much is in the plan: \$ _____
- d. Does your Spouse participate in any company savings plan? _____
How much is in the plan: \$ _____

22. List any other Deferred Compensation Benefits (e.g., workers' compensation, disability benefits, bonuses and other "special payments," employee stock options, and other forms of compensation)

- a. Name or Type of Your Benefit: _____
Please describe the benefit: _____

- b. Name or Type of your Spouse's Benefit: _____
Please describe the benefit: _____

23. List any Brokerage or Mutual Fund Accounts:

Account #1

- a. Name of Account : _____
- b. Estimate amount invested : _____

Account #2

- a. Name of Account : _____
- b. Estimate amount invested : _____

24. List all Stocks, Bonds, and Other Securities (include securities not previously disclosed in this interview):

Investment #1

- a. Name of Stock : _____
- b. Estimate amount invested : _____

Investment #2

- a. Name of Stock : _____
- b. Estimate amount invested : _____

25. List any and all Other Assets name any other assets or property not named above:

26. Debts: (Other than house and/or automobiles; e.g., Charge Cards, Personal Loans, etc....)

- a. _____ \$ _____
- b. _____ \$ _____
- c. _____ \$ _____
- d. _____ \$ _____
- e. _____ \$ _____
- f. _____ \$ _____
- g. _____ \$ _____

27. Income Tax

- a. Have you filed for all previous years? _____
- Prepared by whom : _____

b. Refund received? : _____

If so, how much:

\$ _____

28. Separate Property

a. Do you own any separate property (property owned before marriage or property received during marriage as a gift or inheritance)? _____

If so, detail property : _____

29. Does your spouse own separate property? _____

If so, detail property : _____

