New Client Intake Form

Divorce Without Court: Westside Collaborative Law, PLLC ©

This is a comprehensive checklist of the information that our firm may need to provide the court in connection with your divorce, separation, or longtime relationship. Please fill out this form as far as you can. Feel free to leave anything blank if you feel it's not relevant to you. This list is intended to be thorough and to cover every eventuality. Individual circumstances may vary, however. Not every individual will need to provide all this information. Thank you for your interest!

-Jeff and Elizabeth Steen

Today's date: __________

I. *PERSONAL INFORMATION*

Date of Birth: ____ / ____ / ______ State (or country) of birth: ____________________

Name at birth (if different): ____

Social Security Number: _ _ _ - _ _ - _ _ _ _

Driver's License Number: ______________________

Current address: ____

Date of marriage: ____ / ____ / ______ Date of separation: ____ / ____ / ______

County and state (or country) where marriage took place: ___________________________

II. *CHILDREN*

For each child please provide:

(1) Date of birth

(2) First, middle, and last name

(3) Whether or not the child has any special needs (healthcare, sports, etc.)

(4) Gross income of each parent, in order to provide support calculations

III. *REAL PROPERTY*

For each property, please provide:

(1) purchase date

(2) purchase price

(3) estimated current value

(4) amount remaining on mortgage

(5) HELOC or other liens

(6) source of funds for down payment

IV. *JOINT BANK ACCOUNTS*

For each account, please provide:

(1) type of account (savings, checking, etc.)

(2) name of bank

(3) estimate of current balance

(4) main purpose of account (mortgage, household expenses, etc.)

V. *INDIVIDUAL BANK ACCOUNTS*

For each account, please provide:

(1) type of account (savings, checking, etc.)

(2) name of account holder

(3) name of bank

(4) estimate of current balance

(5) main purpose of account (mortgage, household expenses, etc.)

VI. *RETIREMENT ACCOUNTS*

For each account, please provide:

(1) type of account

(2) name of account holder

(3) name of brokerage of employer

(4) date opened

(5) current balance

(6) date funds may be accessed without penalty

VII. *PRIVATE AND FAMILY LOANS*

For each loan or informal financial arrangement, please provide:

(1) date of loan

(2) amount of loan

(3) collateral securing loan, if any

(4) terms of loan

(5) amount repaid

(6) amount remaining to be paid

VIII. *STOCKS*

For each stock account that you hold, please provide:

(1) brokerage account

(2) type of account (stock certificates, mutual funds, bonds, limited partnerships, etc.)

(3) name of account holder

(4) current balance

(5) amount of investment

(6) source of funds

IX. *EMPLOYER-PROVIDED STOCKS*

For each employer-provided stock such as stock options, restricted stock units, employee stock purchase plans, or other types of employee equity compensation plans, please provide:

(1) type of account

(2) date of award

(3) date of next vesting

(4) vesting schedule

(5) whether or not this is considered part of your salary

X. *PERSONAL PROPERTY ASSETS OF VALUE*

This may include family heirlooms, artwork, music, antiques, memberships, season tickets for sports, and theatrical or other events. For each such item, please provide:

(1) item

(2) date acquired

(3) whether or not the item was a gift, and if so, from whom

(4) estimated value

THANK YOU FOR TAKING THE TIME TO COMPLETE THE INTAKE FORM!