



**LEACH FOX LAW**  
ESTATE ATTORNEYS

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## **MARITAL PROPERTY AGREEMENT QUESTIONNAIRE**

In response to your contact with our office regarding preparation of a Marital Property Agreement in anticipation of your upcoming marriage, enclosed herein please find a questionnaire for you to complete in preparation for your appointment.

The completion of this questionnaire prior to your appointment will enable us to better serve you in a more timely and professional manner. If there is other information that we need, we will cover that at our initial office conference.

### **You will need to bring the following documents with you, if available:**

1. Copy of Warranty Deeds on all real estate;
2. Copy of any Promissory Notes or Deeds of Trust on real estate;
3. Copy of statements on tax deferred accounts (401K, IRA, etc.);
4. Copy of current brokerage account statements;
5. Copy of current mutual fund statements;
6. Copy of any stock certificates or other dividend reinvestment plan;
7. Copy of current bank statements for all accounts; and
8. Copy of titles to any vehicles.

We appreciate the opportunity to be of service to you in this matter.

**Leach Fox Law, Estate Attorneys**

## **Marital Property Agreement Information Sheet**

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

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

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

Home Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Employer: \_\_\_\_\_ Work Phone: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Anticipated Marriage Date: \_\_\_\_\_

Texas Residence Established Date: \_\_\_\_\_ U.S. Citizen: Y/ N

### **Children**

	Name	Address	Age
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

### **Future Spouse's Information Sheet**

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

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

Home Phone: \_\_\_\_\_ Mobile: \_\_\_\_\_

Employer: \_\_\_\_\_ Work Phone: \_\_\_\_\_

SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Anticipated Marriage Date: \_\_\_\_\_

Texas Residence Established Date: \_\_\_\_\_ U.S. Citizen: Y/ N

**Children**

	Name	Address	Age
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

**Your Asset Information**

**Real Estate:**

	Address:	Mortgage Balance:	Ownership on Warranty Deed:	Current Value:
1.	_____	\$ _____	_____	\$ _____
2.	_____	\$ _____	_____	\$ _____
3.	_____	\$ _____	_____	\$ _____

Life Insurance:

	Insurance Company	Type (term, whole life, universal or variable)	Cash Value:	Death Benefit:
1.	_____	_____	\$ _____	\$ _____
2.	_____	_____	\$ _____	\$ _____
3.	_____	_____	\$ _____	\$ _____

**Tax Deferred Assets:**

	401K or IRA Company:	Primary Beneficiary:	Current Value:
1.	_____	_____	\$ _____
2.	_____	_____	\$ _____
3.	_____	_____	\$ _____

4. \_\_\_\_\_ \$ \_\_\_\_\_

**Brokerage Accounts:**

Brokerage Company:	Acct. #:	Name on Account:	Advisor & Phone Number:	Current Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____

**Mutual Funds:**

Name of Fund:	Current Acct. #L	Name on Acct.:	Value:
1.	_____	_____	\$ _____
2.	_____	_____	\$ _____
3.	_____	_____	\$ _____
4.	_____	_____	\$ _____

**Stocks and Bonds (held outside of brokerage account):**

Company:	Number of Shares or Amount of Bond:	Name shown on Certificate:	Current Value:
1.	_____	_____	\$ _____
2.	_____	_____	\$ _____
3.	_____	_____	\$ _____
4.	_____	_____	\$ _____

**U.S. Savings Bonds:**

Number of bonds: \_\_\_\_\_ Face Value: \_\_\_\_\_ Series: \_\_\_\_\_

Name shown on bond \_\_\_\_\_

**Bank Accounts:**

Bank	Acc. #:	Acct. Type (CD, checking, savings):	Name on Acct.:	Current Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____
3.	_____	_____	_____	\$ _____
4.	_____	_____	_____	\$ _____

**Vehicles:**

Year:	Make:	VIN:	Name on Title:	Value:
1.	_____	_____	_____	\$ _____
2.	_____	_____	_____	\$ _____

**Businesses:**

Name:	Type (corp, partnership, sole proprietorship):	Percentage of Ownership:	Current Sale Agreement:
1. _____	_____	_____ %	Yes / No
2. _____	_____	_____ %	Yes No

**Tangible Personal Property:**

Item description (provide separate list if needed):	Value:
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____

**Liabilities (Debts):**

Item Description:	Amount:
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____

## Future Spouse's Asset Information

### Real Estate:

Address:	Mortgage Balance:	Ownership on Warranty Deed:	Current Value:
1. _____	\$ _____	_____	\$ _____
2. _____	\$ _____	_____	\$ _____
3. _____	\$ _____	_____	\$ _____

### Life Insurance:

Insurance Company	Type (term, whole life, universal or variable)	Cash Value:	Death Benefit:
1. _____		\$ _____	\$ _____
2. _____		\$ _____	\$ _____
3. _____		\$ _____	\$ _____

### Tax Deferred Assets:

401K or IRA Company:	Primary Beneficiary:	Current Value:
1. _____		\$ _____
2. _____		\$ _____
3. _____		\$ _____
4. _____		\$ _____

### Brokerage Accounts:

Brokerage Company:	Acct. #:	Name on Account:	Advisor & Phone Number:	Current Value:
1. _____				\$ _____
2. _____				\$ _____

3. \_\_\_\_\_ \$ \_\_\_\_\_

**Mutual Funds:**

Name of Fund:	Current Acct. #L	Name on Acct.:	Value:
1. _____			\$ _____
2. _____			\$ _____
3. _____			\$ _____
4. _____			\$ _____

**Stocks and Bonds (held outside of brokerage account):**

Company:	Number of Shares or Amount of Bond:	Name shown on Certificate:	Current Value:
1. _____			\$ _____
2. _____			\$ _____
3. _____			\$ _____
4. _____			\$ _____

**U.S. Savings Bonds:**

Number of bonds: \_\_\_\_\_ Face Value: \_\_\_\_\_ Series: \_\_\_\_\_  
Name shown on bond \_\_\_\_\_

**Bank Accounts:**

Bank	Acc. #:	Acct. Type (CD, checking, savings):	Name on Acct.:	Current Value:
1. _____				\$ _____
2. _____				\$ _____

3. \_\_\_\_\_ \$ \_\_\_\_\_

4. \_\_\_\_\_ \$ \_\_\_\_\_

**Vehicles:**

Year:            Make:            VIN:                                  Name on Title:                          Value:

1. \_\_\_\_\_ \$ \_\_\_\_\_

2. \_\_\_\_\_ \$ \_\_\_\_\_

**Businesses:**

Name:	Type (corp, partnership, sole proprietorship):	Percentage of Ownership:	Current Sale Agreement:
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1.	_____	_____ %	Yes / No
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2.	_____	_____ %	Yes / No
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**Tangible Personal Property:**

Item description (provide separate list if needed):	Value:
1. _____	\$ _____

2. _____	\$ _____
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3. _____	\$ _____
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**Liabilities (Debts):**

Item Description:	Amount:
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1. _____	\$ _____
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2. _____	\$ _____
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3. _____	\$ _____
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**Other Property:**

\_\_\_\_\_

\_\_\_\_\_



