



PRENUPTIAL AGREEMENT QUESTIONNAIRE

NOTICE: This document is highly confidential and protected by attorney-client privilege. It contains sensitive financial information and personal identification numbers.

General Information:

- Spouse #1: _____
- Spouse #2: _____
- On what date do you propose to be married? _____, 20____
- Where will be marriage take place? _____
- Do you feel pressured in any way to enter into a prenuptial agreement?
- How many living children does your prospective spouse presently have?

| <u>Name</u> | <u>Age</u> | <u>Financially Independent</u> | <u>Disability</u> |
|-------------|------------|--------------------------------|-------------------|
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- How many children do you presently have?

| <u>Name</u> | <u>Age</u> | <u>Financially Independent</u> | <u>Disability</u> |
|-------------|------------|--------------------------------|-------------------|
| | | | |
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- Will you and your prospective spouse exchange medical information? yes no
- Will you and your spouse exchange or permit disclosure of other information including but not limited to credit reports, financial account statement, and information held by law enforcement agencies. yes no
- If so, please list the assets and liabilities of Spouse #1 on Exhibit A and the assets and liabilities of Souse #2 on Exhibit B. Please include all bank accounts, sources of income, financial investments, salaries, pensions, dividends, interest, capital gains, rents, life/long term care insurance, annuities, investment/retirement/brokerage/checking/savings accounts, commodities, collectibles, vehicles (boats, ATVs, planes, etc.), inheritance
- Where will the marital residence be located?



Address City State Zip

- Is the marital residence currently the home of one prospective spouse? yes no
 - The marital residence is owned by Spouse #1 Spouse #2
- Does the other prospective spouse also own a home? yes no

Address City State Zip

- Desired ownership of the marital residence after marriage:
 - owned by Spouse #1
 - owned by Spouse #2
 - owned jointly as tenants in common
 - owned jointly with right of survivorship
- Who will pay for the cost of the housing?
 - paid for equally by the parties
 - paid for by the parties in proportion to their net taxable income
 - paid for by Spouse #1
 - paid for by Spouse #2
 - other: _____
- If new purchases of household furnishings will be made, will they be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the party who made the purchase?
- Please list any other real estate owned by the parties (farm, ranch, vacation, commercial, investment, rental, unimproved, residence, etc.):

Address City State Zip

- owned by Spouse #1
- owned by Spouse #2
- owned jointly as tenants in common



- owned jointly with right of survivorship
- other: _____

- With respect to routine living expenses, will they be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?

- With respect to automobile purchases, repair, maintenance, and replacement, will these expenses be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the party for whose benefit the cost was incurred?

- Do the parties currently have health insurance?
 - Please list coverage for Spouse #1: _____

 - Please list coverage for Spouse #2: _____

- With respect to health insurance, will such premiums be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the party for whose benefit the cost was incurred?
 - paid individually by each party?

- Un-reimbursed medical expenses. These expenses are those rising out of deductibles or co-insurance. Such expenses will be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the party for whose benefit the cost was incurred?



- Catastrophic illness expense. A catastrophic illness expense is one that is not covered by health insurance or the limits of the insurance coverage have been exceeded. Such expenses will be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the party for whose benefit the cost was incurred?

- Long term care expenses. Nursing home care and care in an assisted living facility is not covered by Medicare or most health insurance policies.
 - Does Spouse #1 currently have Long Term Care insurance? yes no
If so, list coverage information: _____
 - Does Spouse #2 currently have Long Term Care insurance? yes no
If so, list coverage information: _____
 - If either does not have coverage, please list any health issues that might prevent the purchase of Long Term Care Insurance? _____

- Extraordinary expenses. These expenses are non-routine, unusual expenses that are not medical expenses and not routine expenses. Such expenses will be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the party for whose benefit the cost was incurred?

- Tax returns. If from time to time you and your prospective spouse should find it beneficial to file a joint tax return, then the cost of the taxes and preparation will be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?

- With respect to vacation and travel, such expenses will be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?



- paid for by Spouse #2?
- With respect to club memberships, the recurring cost of membership will be:
 - paid for equally by the parties?
 - paid for by the parties in proportion to their net taxable income?
 - paid for by Spouse #1?
 - paid for by Spouse #2?
 - paid for by the primary member?
- Have you agreed to pass your estate on to your prospective spouse? yes no
- Will you give prospective spouse the right to live in the marital residence for life, after your death? yes no
- Have you agreed to leave your prospective spouse any specific property in your will? yes no

If so, describe the property:

- Have you agreed to leave your prospective spouse any cash money? yes no
If so, how much? \$_____
- Have you agreed to name your prospective spouse as beneficiary of any life insurance proceeds? yes no

If so, please state policy number, name of company and face amount of proceeds?

- Have you agreed to name your spouse as beneficiary of any employment benefits? yes no

If so, name of employee benefit plan?

- Have you agreed to own any assets jointly with your prospective spouse with right of survivorship? yes no

If so, describe such property.



Law Office of
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Exhibit A



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Exhibit B