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Attorneys at Law

DivorceInKentucky.com

LEGAL SEPARATION DATAPACK

Dear Prospective Family Law Client:

If you are thinking about a legal separation, we know this is a very difficult time for you. We would be happy to talk to you if you need to learn more about your rights, duties and options. We cannot, however, offer anyone free legal advice.

Is a legal separation the right choice for you?

First, let's talk about what a ***legal separation*** is and what it isn't. This subject is covered in detail on our website at http://www.divorceinkentucky.com/legal-separation-instead-of-divorce-in-kentucky.htm but here are some of the high points:

- The "Legal Separation" process is actually very similar to the divorce process, resulting in a slightly different end product.
- A Petition for Legal Separation must be filed with the Court and served on the other party.
- If the parties are able to quickly come to an agreement, the terms of their "Legal Separation" have to be reduced to writing, executed by the parties and their counsel and then filed with the Court. At that point, one party can make a motion for the entry of a Decree of Legal Separation which declares that the parties are still married, but *separated*.
- You and your spouse will be required to file your respective Verified Disclosure Statements (see Part B of the attached Legal Separation Datapack) prior to the entry of a decree.
- If you and your spouse can't reach a settlement agreement on your own, we can attempt to settle the matter through mediation.
- If your spouse is not cooperative about getting a legal separation, we may have no option but to convert the Petition into one seeking an actual divorce. Legal separations can only be accomplished if the parties reach a settlement as to their respective rights and duties.
- Once legally separated, neither party may remarry and they must wait a minimum of 365 days before asking the Court to modify this Decree of Legal Separation into a Decree of Dissolution of Marriage.

This is an advertisement.

- The parties have to "live apart" for a minimum of 60 days before a Decree of Legal Separation can be entered; however, this period may include living under the same roof provided the parties do not engage in sexual cohabitation.

The primary reasons we seen for people seeking a Legal Separation instead of a divorce include situations where:

- The parties continue to have some affection for each other, but wish to establish separate lives, separate obligations, separate assets, separate responsibilities, etc.; they can remain technically married but legally separated. This can be a result of a party's alcoholism, drug abuse, gambling or other addiction, prolific spending habits, infidelity or other circumstance upsetting the equilibrium of the marriage. A legal separation can offer some protection to a party with respect to their assets and liabilities.

- If one spouse has had serious medical problems (such as heart attack, stroke, cancer, etc.), the other party may not wish to leave his or her spouse without health insurance and so they can remain technically married but legally separated.

- If one or both parties do not believe in divorce on moral, ethical or religious grounds but recognize that their marriage has little chance of success or if they simply cannot continue to live as man and wife, they can remain technically married but legally separated.

A Decree of Legal Separation is distinct from a Decree of Dissolution on several critical points, including:

- You are <u>not</u> divorced; technically, you are "legally separated", but still married.

- Neither of you may remarry until the divorce (or "dissolution") itself is final, which cannot happen until a minimum of <u>365 days</u> after the entry of a Decree of Legal Separation.

What if we decide to get back together again?

Very often, during periods of legal separation, couples will attempt to reconcile or they may even resume having marital relations, either briefly or over a period of time. Any of these events may damage your "legally separated" status and risks nullification of the legal separation agreement. Any form of reconciliation should be discussed with your legal counsel prior to the resumption of cohabitation or marital relations.

Simply put, do not resume cohabitation unless you recognize that doing so potentially puts the status of your legal separation and the agreement incorporated into your Decree in peril. Talk to your attorney before making such a decision. Don't do it based purely on your emotional state.

In terms of reconciliation, the key is whether both parties actually intended to resume the marital relationship. When an alleged reconciliation is short or is deemed to be one-sided, it may not be treated as an actual resumption of marital relations or cohabitation. Even so . . . Watch out! These are dangerous waters.

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A Decree of Legal Separation can be left in place indefinitely and the parties' marital status will not change simply due to the passage of time. On the other hand, it is possible to *set aside* a Decree of Legal Separation and, in the eyes of the law, the parties' status as a married couple will remain unchanged.

So, you've read all of the above information and you feel that a legal separation is the right step for you to take at this juncture. Where do we go from here?

Your case will require an initial personal consultation so that we can understand the facts of your case and advise you on your rights and duties. We charge $200 for an initial consultation, during which we expect to give you a really good idea of what you can expect to happen in your legal separation proceedings. Just call my office to set up your initial consultation. We can meet to talk about your options.

But before we can begin actually representing you, we will require (1) a signed contract which explains our respective obligations and (2) a legal engagement fee, the size of which will be based on our estimation of the amount of time needed to resolve your case. *There is no guarantee, however, that all of your legal expenses will be covered by this Engagement Fee.*

In addition, we need a lot of information about you, your spouse, your marriage, your children, your assets, your liabilities, your fears and your objectives.

You need to complete the attached **Legal Separation DataPack** to the best of your ability and provide us with copies of any information or documents pertinent to this matter (including copies of all prior court papers, mortgages, bank statements, mortgages, loan documents, credit card statements, paycheck stubs, etc.).

If you retain our firm to represent you, you will receive monthly bills explaining the professional time and expenses invested in your case which have been billed against your Engagement Fee.

Any information you provide will, of course, be kept confidential and you are under no obligation until we each execute a written Engagement Agreement.

Very truly yours,

JAMES K. MURPHY
RUTH J. WILKERSON
WILLIAM L. HOGE, III
Attorneys at Law

Hoge Partners PLLC

Attorneys at Law
Concentrating in Family Law Representation
throughout Greater Metropolitan Louisville
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***Hoge Partners, PLLC** is the successor to Hoge & Associates, a law practice with a four-decade history of providing legal services throughout Metropolitan Louisville, including Jefferson, Oldham, Hardin and Bullitt Counties.*

JAMES K. MURPHY

Jim Murphy is the Managing Partner of **Hoge Partners, PLLC**. He began practicing law in Kentucky in 1993. He graduated *magna cum laude* from Washington & Lee University and *cum laude* from the Lewis School of Law at Washington & Lee University.

Prior to joining Hoge & Associates in 2014, Jim's practice with another Louisville firm focused in commercial transactions, real estate and business. Since then, he has refocused his practice on Family Law matters with a special emphasis on associated business and real estate factors. Jim's caseload includes a variety of Family Law matters including domestic violence actions and criminal defense in child support matters as well as processing divorces, child support, child custody and post-divorce litigation. He also has significant appellate experience.

RUTH J. WILKERSON

Ruth Wilkerson is a Partner of **Hoge Partners, PLLC**. She has been practicing law in Kentucky since 2010. A graduate of Transylvania University in Lexington, Kentucky and the Appalachian School of Law in Grundy, Virginia, Ruth has a varied legal background which included estate planning, workers compensation, personal injury litigation, employment law, civil rights discrimination and sexual harassment.

Ruth has focused on Family Law matters since joining the firm in 2014. She handles both contested and uncontested divorce actions, post-divorce litigation, modifications of child support and maintenance/alimony, disputed parenting matters such as visitation schedules and primary residence, adoption proceedings, child custody and domestic violence proceedings.

WILLIAM L. HOGE, III

Bill Hoge has been practicing law in Louisville since 1972 and focused on Family Law for better than half of that period. He retired from active practice in 2017. Bill remains of counsel to the firm of **Hoge Partners, PLLC**, providing advice and guidance to attorneys Jim Murphy and Ruth Wilkerson and handling a limited number of cases. He is still a Fellow of the American Academy of Matrimonial Lawyers and formerly served as the Chair of the Family Law Sections for both the Kentucky Bar Association and the Louisville Bar Association. The majority of Mr. Hoge's legal career has been dedicated to Family Law and being of service to people going through the divorce process in Kentucky, individuals needing assistance with post-divorce matters (child support, custody, visitation, etc.), victims of domestic violence, international parental abductions and others situations relating to Domestic Relations law.

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LEGAL SEPARATION DATAPACK

Today's Date: _____

YOUR FULL *LEGAL* NAME: _____
{First Name} {Middle Name} {Last Name} {Jr., Sr., etc.}

PRESENT ADDRESS: _____
{Street Address or P. O. Box}

_____
{City} {County} {State} {Zip}

CONTACT INFORMATION: Mobile Phone -- _____

Home Phone -- _____ Work Phone – _____

E-mail Address: _____

How do you prefer we contact you? [__]Mobile Phone [__]Home Phone [__]Work Phone
[__]Email [__]Other: _____

THE SPACE BELOW IS FOR OFFICE USE ONLY

Date of Initial Interview: _____ Interviewed by: _____

Terms of Engagement Agreement: ***$_____ per hour x _____ hours***

$_____ + $_____ (expense advance) = $_____

Engagement Agreement signed? _____ Date Signed: _____ Engagement Fee Paid: $_____

Are we filing Petition for Legal Separation? *[Yes] [No]*
Are we filing a Petition for Dissolution? *[Yes] [No]*
If YES, Petition will be filed in _____ County

Initial Documents Required:
_____ Draft *Petition for Legal Separation* OR
_____ Draft *Petition for Dissolution of Marriage*
Service by: [__] Sheriff [__] Certified Mail [__] Other: _____
_____ Draft Response to Petition for Dissolution of Marriage
_____ Verified Disclosure Statement or [__] *VDS Acknowledgment*

Initial Motions:
_____ Motion for Temporary Restraining Order with Client's Affidavit
_____ Motion for Temporary Custody of Child(ren) with Affidavit
_____ Motion for Temporary Child Support with Affidavit
_____ Motion for Temporary Maintenance with Affidavit
_____ Motion for Hearing (with Client's Affidavit) regarding:
___ Marital Property ___ Visitation ___ Attorney Fees
Other: _____

Discovery:
_____ Interrogatories _____ Request for Admissions
_____ Request for Production of Documents
_____ Notice of Deposition of _____
BY [__] VIDEO OR [__] COURT REPORTER?

Scheduled Execution Date: _____
Other: _____

How did you learn about us?

[__] Internet search for term: "_____"
[__] Our website at www.DivorceInKentucky.com
[__] Referral from:
[__] Other: _____

PERSONAL INFORMATION ON YOU

YOUR AGE ON LAST BIRTHDAY: _____

MAIDEN NAME (if Wife): _____

YOUR DATE OF BIRTH: _____ RACE*: _____
* Required for State's Vital Statistics Form

SOCIAL SECURITY NUMBER: _____-_____-_____

YOUR PLACE OF BIRTH: _____

YOUR OCCUPATION: _____

YOUR EMPLOYER: _____

YOUR W-2/1099/K-1 WAGES: As reported on your most recent tax return -- $_____

NATURE OF INDUSTRY: _____

RESIDENT OF KENTUCKY SINCE: _____

How long at current address? _____

PREVIOUS ADDRESS: _____

_____

How long at that address? _____

NUMBER OF TIMES MARRIED: _____

YOUR RELIGIOUS PREFERENCE: _____

YOUR HIGHEST LEVEL OF EDUCATION:

[___]High School [___]GED [___]Vocational School
[___]College Graduate [___]Post-Graduate School
[___]Other: _____

YOUR CITIZENSHIP OR IMMIGRATION STATUS:

[___]U.S. Citizen by birth
[___]Naturalized U.S. Citizen from _____
[___]Immigrant (Lawful Permanent Resident) from _____
(When was Green Card acquired? _____)
[___]Nonimmigrant from _____ (student visa, tourist visa, etc.)
[___]Illegal or Undocumented Alien from _____
(out of status since _____)
[___]Resident of another country: _____

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PERSONAL INFORMATION ON YOUR SPOUSE

SPOUSE'S **FULL** LEGAL NAME: _____
{First Name} {Middle Name} {Last Name} {Jr., Sr., etc.}

MAIDEN NAME (if spouse is Wife): _____

SPOUSE'S PRESENT AGE: _____

SPOUSE'S DATE OF BIRTH: _____ RACE*: _____
* Required for State's Vital Statistics Form

PLACE OF BIRTH: _____

SPOUSE'S SOCIAL SECURITY NUMBER: _____

SPOUSE'S TELEPHONE NUMBER: _____

SPOUSE'S PRESENT ADDRESS: _____

How long at current address? _____

PREVIOUS ADDRESS: _____

_____

How long at that address? _____

SPOUSE'S OCCUPATION: _____

NATURE OF INDUSTRY: _____

SPOUSE'S EMPLOYER: _____

SPOUSE'S EMPLOYER'S ADDRESS: _____

YOUR SPOUSE'S W-2/1099/K-1 WAGES: As reported on your most recent tax return -- $_____

RESIDENT OF KENTUCKY SINCE: _____

NUMBER OF TIMES MARRIED: _____

SPOUSE'S RELIGIOUS PREFERENCE: _____

SPOUSE'S HIGHEST LEVEL OF EDUCATION:
[___]High School [___]GED [___]Vocational School
[___]College Graduate [___]Post-Graduate School
[___]Other: _____

SPOUSE'S CITIZENSHIP OR IMMIGRATION STATUS:
[___]U.S. Citizen by birth
[___]Naturalized U.S. Citizen from _____
(When was U.S. Citizenship granted? _____)
[___]Immigrant (Lawful Permanent Resident) from _____
(When was Green Card acquired? _____)
[___]Non-immigrant from _____ (student visa, tourist visa, etc.)
[___]Illegal or Undocumented Alien from _____
(out of status since _____)
[___]Resident of another country: _____

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YOUR MARRIAGE

DATE OF MARRIAGE: _____

WHERE WERE YOU MARRIED? _____
{City} {County} {State}

WAS THIS A CIVIL OR RELIGIOUS CEREMONY? [___]Civil [___]Religious

Performed by whom? _____

ARE YOU TWO STILL LIVING AT THE SAME ADDRESS? [__] Yes [___] No

ARE YOU TWO STILL SLEEPING IN THE SAME ROOM? [__] Yes [___] No

ARE YOU TWO STILL "LIVING TOGETHER AS MAN AND WIFE"? [__] Yes [___] No

DATE OF LAST SEXUAL RELATIONS WITH YOUR SPOUSE: _____

Note: The legal definition of the word "separation" refers to the date that one party left the marital home and took up residence elsewhere. A "separation" can include married parties living in the same house, so long as they are not engaging in sexual intercourse with each other. **The resumption of sexual relations between married parties during divorce or separation proceedings can require them to recommence the 60-day waiting period generally required before official dissolution of a marriage.** [KRS 403.170(1): *No decree shall be entered until the parties have lived apart for 60 days. Living apart shall include living under the same roof without sexual cohabitation.*]

DATE OF SEPARATION *(This is very important!)*: _____

CIRCUMSTANCES OF SEPARATION: _____

_____

_____

Please describe why you feel this marriage is "irretrievably broken".

_____

_____

Does the Wife want her *maiden name restored*? [__] Yes [___] No [___] Unknown

Do you or your spouse have valid passports? [__] Husband has passport [___] Wife has passport

Do either of you have **Facebook, Instagram, Twitter** or other social networking accounts?

[__] Yes [___] No [____] Unknown

If yes, do you know the password for your spouse's account(s)? [__] Yes [___] No [___] N/A

If yes, does your spouse know the password for your account(s)? [__] Yes [___] No [___] N/A

We strongly urge you to change the password on all your electronic accounts, including email, social networking sites, etc. We also highly recommend you ***remove from any websites or social networking accounts any postings, photographs, etc. which might be used against you in any manner*** *(pictures of you partying or drinking, for instance). We can almost guarantee that such electronic evidence will be used against you if this matter becomes contested. Better to take it down now than to have it come up at trial a few months from now!*

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DOMESTIC VIOLENCE

The National Domestic Violence Hotline (www.ndvh.org) defines domestic violence as *"a pattern of behavior in any relationship that is used to gain or maintain power and control over an intimate partner."* According to the Kentucky Domestic Violence Association (www.kdva.org), domestic violence is *"a pattern of coercive behaviors that one person exercises over another."*

Regardless of the definition, if you are in an abusive relationship or situation, you must seek out the resources you need to protect yourself and your children from abuse.

You may be in a ***physically abusive*** relationship if your partner has ever damaged property when angry (thrown objects, punched walls, kicked doors, etc.); pushed, slapped, bitten, kicked or choked you; abandoned you in a dangerous or unfamiliar place; scared you by driving recklessly; used a weapon to threaten or hurt you; forced you to leave your home; trapped you in your home or kept you from leaving; prevented you from calling police or seeking medical attention; hurt your children or used physical force in sexual situations.

You may be in a ***sexually abusive*** relationship if your partner views women as objects and believes in rigid gender roles; accuses you of cheating or is often jealous of your outside relationships; wants you to dress in a sexual way; insults you in sexual ways or calls you sexual names; has ever forced or manipulated you into to having sex or performing sexual acts; held you down during sex; demanded sex when you were sick, tired or after beating you; hurt you with weapons or objects during sex; involved other people in sexual activities with you or ignored your feelings regarding sex.

You may be in an ***emotionally abusive*** relationship if your partner calls you names, insults you or continually criticizes you; does not trust you and acts jealous or possessive; tries to isolate you from family or friends; monitors where you go, who you call and who you spend time with; does not want you to work; controls finances or refuses to share money; punishes you by withholding affection; expects you to ask permission; threatens to hurt you, the children, your family or your pets or humiliates you in any way.

Have there *ever* been any episodes of domestic violence or abusive behavior between the two of you prior to or during this marriage?

[__] Yes [___] No

If yes, please explain: _____

_____

_____

_____

_____

Are any DVOs currently in effect? _____

Do you know how to take out an EPO if you need to protect yourself or your children?

[__] Yes [___] No. If "No", ask us or see the ***Domestic Violence*** section of our website.

If you have any concerns about your safety or the safety of your children with respect to potential domestic violence, we urge you to talk to us about how to set up a Safety Plan to protect yourself and your children.

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CHILDREN OF THE MARRIAGE

Number of children (regardless of age) born of this marriage: ***0 1 2 3 4 5*** __

Have your children resided in Kentucky for at least the past 180 days (six months)? [___]Yes [___]No

If the answer is "No", when did the children move to Kentucky? _____

Is there any possibility the Wife is currently pregnant? _____

Religious preferences of the parties as to the raising of the children: _____

Is there any risk that your spouse might take the children somewhere against your wishes or without your consent? (***"Parental abduction"*** either domestically [within the United States] or internationally?)

[___]Yes [___]No [___]Don't know [___]Never thought of that

If yes, where do you think he/she would take the children? _____

If yes, how great a risk do you believe parental abduction to be? _____

Do any of your children have valid passports? [___]Yes [___]No

If yes, where were the children's passports issued? [___]U.S. [___] Elsewhere:_____

Can you provide us with copies of the children's passports? [___]Yes [___]No

If any children born as a result of this marriage are still minors (under 18 or unemancipated), please provide the following information required under the UCCJEA concerning any such minor child or children:

(1) Name: _____

Date of birth: _____ Present Age: _____ Race: _____

Child's Social Security Number: _____

Place of residence: _____

Child lives there with: _____

Child has lived there since: _____

* Previous residence: _____

Child lived there with: _____

Dates child lived at that address: _____

* *The Court requires that we list all residences and individuals with whom each **minor child** has lived for the past FIVE (5) years. If more space is needed, please use the back of this page.*

(2) Name: _____

Date of birth: _____ Present Age: _____ Race: _____

Child's Social Security Number: _____

Place of residence: _____

Child lives there with: _____

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Child has lived there since: _____

Previous residence: _____

Child lived there with: _____

Dates child lived at that address: _____

Child's present school: _____ Grade: _____

With which parent does this child wish to live? _____

(3) Name: _____

Date of birth: _____ Present Age: _____ Race: _____

Child's Social Security Number: _____

Place of residence: _____

Child lives there with: _____

Child has lived there since: _____

Previous residence: _____

Child lived there with: _____

Dates child lived at that address: _____

Child's present school: _____ Grade: _____

With which parent does this child wish to live? _____

[___] IF YOU HAVE MORE THAN THREE CHILDREN FROM THIS MARRIAGE, PLEASE *CHECK HERE* AND IDENTIFY THOSE CHILDREN ON A SEPARATE SHEET OF PAPER.

IF YOU HAVE ANY CHILDREN OF THIS MARRIAGE WHO ARE NOW **ADULTS** (*OVER 18, EMANCIPATED OR MARRIED*), PLEASE IDENTIFY THOSE CHILDREN BELOW:

Adult Child #1: Name: _____

Date of birth: _____ Present Age: _____

Emancipation status: [__]Married [__]Living on his/her own [__]Living in our home

Adult Child #2: Name: _____

Date of birth: _____ Present Age: _____

Emancipation status: [__]Married [__]Living on his/her own [__]Living in our home

If more space is needed, please use a separate sheet of paper.

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Child Custody, Support and Parenting Schedules

Do you have any special concerns about the **health, welfare or safety of your children**? If so, please explain.

Do any of your children have **special needs** (physical limitations, disabilities, handicaps, learning or developmental delays, chronic medical conditions, psychiatric problems, etc.)? If so, please explain.

Have you and your spouse made any arrangements or agreements concerning custody, parenting schedules or support of the children? If so, please describe.

Do you wish to seek child support from your spouse? _____

Has any minor child of this marriage ever been involved in a custody dispute? If so, please give details.

Does anyone besides you and your spouse have any custody claim on any minor child of this marriage? If so, please identify.

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Please state who (IN YOUR OPINION) is best suited to have legal custody of the children and briefly explain your position.

IMPORTANT DEFINITIONS:

"Primary Residential Parent" currently means the designated parent has the right to make day-to-day decisions on behalf of the child. The other parent has the right to have input into major life decisions (health, education, religion, etc.).

"Joint Custody" means the parties must jointly make all such major life decisions affecting the children (health, education and religion).

"Sole Custody" means one of the has unilateral authority concerning all aspects of the child's life. Sole Custody is granted only very rarely and only in circumstances where the presence of the non-custodial parent in a child's life is proven to place that child in clear and present risk of truly serious injury (*i.e.*, sexual or physical abuse of the child, drug use in the presence of the child, engaging in criminal activity in the presence of the child, neglect of the child, endangering the safety and welfare of the child, etc.)

"Timesharing" is the schedule under which the children are with their respective parents.

What **parenting schedule** are you and your spouse utilizing at the present time?

FINANCIAL HISTORY OF THE PARTIES

We recommend that you obtain a copy of your ***credit report*** and bring that with you on your first appointment. There are several on-line options for obtaining copies of your credit report but most require you to sign up for a monthly fee and additional services. We suggest you try ***AnnualCreditReport.com***, to which we have no connection but it has come highly recommended as a free service of use to divorcing parties.

"**AnnualCreditReport.com** is a centralized service for consumers to request free annual credit reports. It was created by the three nationwide consumer credit reporting companies - Equifax, Experian and TransUnion. **AnnualCreditReport.com** provides consumers with the secure means to request and obtain a free credit report once every 12 months from each of the three nationwide consumer credit reporting companies in accordance with the Fair and Accurate Credit Transactions Act (FACT Act). **AnnualCreditReport.com** offers consumers a fast and convenient way to request, view and print their credit reports in a secure Internet environment. We also provide options to request reports by telephone and by mail."

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MAINTENANCE ("ALIMONY")

Have you and your spouse made any arrangements or agreements concerning maintenance? If so, please describe.

_____

_____

Do you wish to seek maintenance from your spouse? _____

Do you expect to pay maintenance to your spouse? _____

PRIOR MARRIAGES OF THE PARTIES

Have you or your spouse had any prior marriages? If so, please indicate how such marriage(s) ended [death, divorce, annulment, etc.].

_____

_____

Were any children born as a result of those prior marriages? _____

To which spouse? _____

Who has custody of these children? _____

If more space is needed, please use an additional sheet of paper.

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STATUS OF LEGAL PROCEEDINGS

YES	NO	DON'T KNOW	
			Has an ***EPO*** been entered or sought by either of you? If YES, provide us with a copy immediately!
			Has your spouse consulted an attorney yet? If YES, his/her name, if known: _____
			Has a ***Petition for Dissolution*** or ***Petition for Legal Separation*** been filed yet by you or your spouse? If YES: When? _____ Where? [__] Jefferson Co. [__] Oldham Co. [__] Other: _____ By whom? _____ If YES, provide us with a copy immediately!
			Have you been **served** with an EPO, Petition for Dissolution, Petition for Legal Separation or other legal proceeding involving this marriage or any other legal action? If YES, when were you served? Exact Date: _____ Please immediately provide us with a copy of everything served on you!
			Have any ***Court Orders*** been entered? If YES, describe: _____ Please provide us with a copy immediately!
			Are any ***Motions*** pending at this time? If YES, describe: _____ Please provide us with a copy immediately!
			Have you signed anything which might affect this case? A prenuptial or postnuptial agreement, for instance. If YES, please describe: _____ Please provide us with a copy immediately!
			Are there any potential or pending personal injury, workers compensation or disability claims involving either party. If YES, please describe: _____

CHRONOLOGY

We need a brief "snapshot" of your life, before and after your marriage. Please fill this page out as best you can. We recognize this may seem redundant, but having this information on one page is very useful to us.

Client's Date of Birth: _____ Spouse's Date of Birth: _____

Previous Marriages
by Either Party
(Dates and Names): _____

Courtship began with
Current Spouse: _____

Date of Marriage: _____

Children's Names and
Birth Dates: _____ Born: _____

_____ Born: _____

_____ Born: _____

_____ Born: _____

Acquisition of Major
Assets (house, car, etc.) _____ Date: _____

_____ Date: _____

_____ Date: _____

Dates of Parties' Current
Employment and Positions: Husband's Current Employer:

_____

Position: _____

Annual Salary: _____

Wife's Current Employer:

_____

Position: _____

Annual Salary: _____

Other significant events
during marriage: _____

_____

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YOUR INITIAL GOALS FOR EVENTUAL SETTLEMENT

Please outline for us what you see as your initial goals for resolution of this matter:

Custody of Child(ren): [__]Not applicable [__]Joint [__]Sole [__]Other: _____

Parenting Time with Child(ren):
[__]Not applicable
[__]Child(ren) to reside primarily with _____
[__]Child(ren) to spend every other weekend with other parent
[__]Child(ren) to have portion of summer with other parent
[__]Other arrangement --

_____

_____

Restoration of Non-Marital Property: Briefly identify any non-marital property (personal or real) that you feel strongly about being restored to you (*e.g.*, inheritances, gifts to you, things you owned before the marriage)

_____

_____

Division of Real Estate: Briefly identify any real property owned by either or both of you and who you think should have it at the conclusion of this action

_____

_____

Division of Personal Property: Briefly identify who should end up with what personal property items

Household Goods, Furniture, Furnishings, Appliances, Decor Items, Tools, etc. --

_____

_____

_____

Pets -- _____

Automobiles -- _____

Bank Accounts -- _____

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Investment Accounts (stocks, bonds, mutual funds, CDs, etc.) -- _____

_____

Pension and Retirement Accounts -- _____

Responsibility for Debts -- _____

_____

Life Insurance Policies -- _____

Business Interests -- _____

Child Support: Both parents are obligated to contribute to the support of their minor children and the calculation of child support is a mathematical formula proscribed by the Kentucky Legislature based on the combined gross monthly income of the parties (or imputed income if a party is unemployed or voluntarily underemployed)

Do you expect to pay or receive child support? _____

Maintenance: "Maintenance" used to be called "alimony". It is not automatically awarded in divorce or legal separation, and there are many, many factors which go into the court's determination of whether or not maintenance is appropriate. Included in these factors are (a) length of marriage, (b) disparity in the parties' respective incomes or abilities to earn, (c) educational and employment history of the parties, (d) age of the parties, (e) ages of the parties' minor children, etc.

Do you expect to pay or receive maintenance? _____

Attorney Fees: Generally speaking, it is difficult to negotiate the voluntary payment of your fees by the other spouse; however, if the Court is required to decide, they will reluctantly evaluate disparity in the respective parties' estates and incomes.

Do you expect to ask for a contribution toward your attorney fees from your spouse? _____

Special Factors: Are there any special factors of which we should be aware? Drug abuse, alcoholism, infidelity, child abuse, gambling addiction, mental illness, inheritance, bankruptcy, interfering in-laws, religious differences, cultural incompatibility, etc.

_____

_____

_____

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Attached as **Part B** of this **Legal Separation Datapack** is a *Verified Disclosure Statement*, which the Family Courts require be submitted by each party in every divorce **or legal separation** case.

You need to fill out **Part B** to the best of your ability. At a minimum, you need to review the *Verified Disclosure Statement* well enough that, at your initial meeting in our office, you can ask questions about completing it.

A few days after your initial consultation with us and your engagement of our firm as your attorney, we will have another meeting at which time you will need to provide us with your completed *Verified Disclosure Statement*, with the necessary attachments.

Any required or requested documents that you provide to us will go a long way toward controlling your legal costs in this matter. We can obtain copies of Deeds and Mortgages recorded in Jefferson County in the last 20 years or so. We do not have on-line access to deeds and mortgages in other counties. Any other personal documents will have to be provided by you. In the alternative, we may be able to persuade your spouse to provide these documents, but that process is usually time-consuming and expensive.

If the litigation of your case requires certain documents that you cannot or do not provide to us, we must invest a portion of the retainer you have paid to us in the acquisition of those documents.

We presume that you would prefer to be pro-actively involved in your case and that you would prefer to help control your own legal expenses.

The better the documentation provided by you, the better our opportunities to assist you in this matter.

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☑ AOC-238 Doc. Code DSPV
☐ AOC-239 Doc. Code DSFV
Rev. 1-15
Page 1 of 10
Commonwealth of Kentucky
Court of Justice www.courts.ky.gov
FCRPP 2 and FCRPP 3

☑ **Preliminary Verified Disclosure Statement***
☐ **Final Verified Disclosure Statement***

Case No. _____
Court _____
County Jefferson
Division _____

IN RE THE MARRIAGE OF:

_____ PETITIONER

DISCLOSURE OF

and [redacted]

_____ RESPONDENT

☐ Petitioner ☐ Respondent submits under oath the following Verified Disclosure Statement pursuant to FCRPP 2 **OR** FCRPP 3, which requires full and prompt disclosure of the following information:

NOTE: A response of "see attached" is not appropriate for any portion of this statement. Attach documents requested herein only.

I. IDENTIFYING INFORMATION OF BOTH PARTIES

Petitioner	Respondent
Name: _____	Name: _____
Street Address: _____	Street Address: _____
City, State, Zip: _____	City, State, Zip: _____
Age: ____ Phone #: _____	Age: ____ Phone #: _____

II. INCOME AND EMPLOYMENT INFORMATION OF BOTH PARTIES *(If self-employed name of company and adjusted gross monthly income)*

Petitioner	Respondent
Employer Name: _____	Employer Name: _____
Gross monthly income: $ _____	Gross monthly income: $ _____
Other income: $ _____	Other income: $ _____

III. MARRIAGE INFORMATION

Date of Marriage: _____ Date of separation: _____

Place of Marriage (city, county & state): _____

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IV. CHILDREN'S INFORMATION *(If more than 3 children, continue on a separate sheet)*

A. Minor children born to parties *(number _____)* ☐ More CHILDREN attached?

Name	Current Age

B. Monthly child care/day care expenses: Cost $ _____ Paid by _____

C. Monthly medical, dental and vision insurance for children: Cost $ _____ Paid by _____

D. Either party court-ordered to pay child support for a child born before the children born of this marriage? ☐ Yes ☐ No

Paying party _____ Amount: $ _____

Children: (*List names and ages*) _____

_____

V. SUMMARY OF ASSETS & DEBTS

A. REAL ESTATE *(If more than 2 properties, continue on a separate sheet)*

Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Property 1:

Address: _____

1st Mortgage Company: _____

1st Mortgage Payoff Amount: _____

2nd Mortgage Company or Home Equity Loan: _____

2nd Mortgage or Home Equity Loan Payoff Amount: _____

Fair Market Value: _____ Valuation Date: _____ Equity: _____

Property 2:

Address: _____

1st Mortgage Company: _____

1st Mortgage Payoff Amount: _____

2nd Mortgage Company or Home Equity Loan: _____

2nd Mortgage or Home Equity Loan Payoff Amount: _____

Fair Market Value: _____ Valuation Date: _____ Equity: _____

More REAL ESTATE attached? ☐ **Yes** ☐ **No** **Total Real Estate Equity:** _____

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B. VEHICLES - Automobiles, Motorcycles, Boats, Trucks, Motor Homes, etc. *(If more than 3 vehicles, continue on a separate sheet)*
Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Vehicle 1:
Primary Driver: _____ Year, Make & Model: _____
NADA Value: _____ Valuation Date: _____ Debt Owed: _____
Lien Holder: _____ Equity: _____
Is this a leased vehicle? ☐ Yes ☐ No *If yes, please complete the following:* Monthly Payment: _____
Lease Term Ends: _____

Vehicle 2:
Primary Driver: _____ Year, Make & Model: _____
NADA Value: _____ Valuation Date: _____ Debt Owed: _____
Lien Holder: _____ Equity: _____
Is this a leased vehicle? ☐ Yes ☐ No *If yes, please complete the following:* Monthly Payment: _____
Lease Term Ends: _____

Vehicle 3:
Primary Driver: _____ Year, Make & Model: _____
NADA Value: _____ Valuation Date: _____ Debt Owed: _____
Lien Holder: _____ Equity: _____
Is this a leased vehicle? ☐ Yes ☐ No *If yes, please complete the following:* Monthly Payment: _____
Lease Term Ends: _____

More VEHICLES attached? ☐ Yes ☐ No **Total Vehicle Equity:** _____

C. BANK ACCOUNTS – Checking, Savings, CDs, Money Market accounts, etc. *(If more than 3 accounts, continue on a separate sheet) (Do not list account numbers)*
Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Owner(s)	Institution Name [NO ACCOUNT NUMBERS]	Type of Account	Valuation Date	Balance
More BANK ACCOUNTS attached? ☐ Yes ☐ No		Total Current Balances:		

D. STOCKS, BONDS, PORTFOLIOS, MUTUAL FUNDS, ETC. *(If more than 3, continue on a separate sheet)*
Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Institution Name	Stock/Portfolio Name	Valuation Date	Current Value
More INVESTMENTS attached? ☐ Yes ☐ No	Total Current Values:		

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E. RETIREMENT BENEFITS – IRA, Keogh, 401(K), 403(b), Pension, etc. *(If more than 3, continue on a separate sheet)*
Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Participant	Plan Name	Contrib/Non	Vested/Non	Pay Status?	Valuation Date	Balance
More RETIREMENT BENEFITS attached? ☐Yes ☐No			Total Retirement Benefits Values:			

Have any loans been taken out against any of these Retirement Benefits? ☐ Yes ☐ No
If so, describe:

F. LIFE INSURANCE *(If more than 3 policies, continue on a separate sheet)*
Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Policy 1:
Company: _____ Party Insured: _____
Beneficiary: _____ Term/Whole: _____
Policy #: _____ Valuation Date: _____ Cash Surrender Value: _____

Policy 2:
Company: _____ Party Insured: _____
Beneficiary: _____ Term/Whole: _____
Policy #: _____ Valuation Date: _____ Cash Surrender Value: _____

Policy 3:
Company: _____ Party Insured: _____
Beneficiary: _____ Term/Whole: _____
Policy #: _____ Valuation Date: _____ Cash Surrender Value: _____

More LIFE INSURANCE attached? ☐ Yes ☐ No **Total Cash Value:** _____

G. BUSINESS INTERESTS *(If more than 3 businesses, continue on a separate sheet)*
Are you making a non-marital claim? ☐Yes ☐No *If yes, you must comply with Section IX below.*

Name of Business & Owner: _____
Percentage of Ownership: _____ Type of Business: _____
Corporation, Sole Proprietorship, Partnership, Etc.: _____
Valuation Date: _____ Business Loan(s) Balance: _____ Value of Interest: _____

Name of Business & Owner: _____
Percentage of Ownership: _____ Type of Business: _____
Corporation, Sole Proprietorship, Partnership, Etc.: _____
Valuation Date: _____ Business Loan(s) Balance: _____ Value of Interest: _____

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Name of Business & Owner: _____

Percentage of Ownership: _____ Type of Business: _____

Corporation, Sole Proprietorship, Partnership, Etc.: _____

Valuation Date: _____ Business Loan(s) Balance: _____ Value of Interest: _____

More BUSINESS INTERESTS attached? ☐ Yes ☐ No **Total Values:** _____

H. HOUSEHOLD GOODS:

Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Agreed Division? ☐ Yes ☐ No, but not expected to be in dispute.

☐ No, but dispute anticipated (Suggested appraiser: _____)

Attached is a list of the disputed household items

I. OTHER ASSETS – Cash, Travelers Checks, Debts Others Owe You, Copyrights, Trademarks, Pets or Animals, Jewelry, Collectibles, Tools, Inventions, Other "Liquid Assets," etc. *(If more than 5 items, continue on a separate sheet)*
Are you making a non-marital claim? ☐ Yes ☐ No *If yes, you must comply with Section IX below.*

Item 1:
Item Description: _____
Who Holds Possession: _____ Valuation Date: _____
Fair Market Value: _____ Amount Owed: _____ Net Value or Equity: _____

Item 2:
Item Description: _____
Who Holds Possession: _____ Valuation Date: _____
Fair Market Value: _____ Amount Owed: _____ Net Value or Equity: _____

Item 3:
Item Description: _____
Who Holds Possession: _____ Valuation Date: _____
Fair Market Value: _____ Amount Owed: _____ Net Value or Equity: _____

Item 4:
Item Description: _____
Who Holds Possession: _____ Valuation Date: _____
Fair Market Value: _____ Amount Owed: _____ Net Value or Equity: _____

Item 5:
Item Description: _____
Who Holds Possession: _____ Valuation Date: _____
Fair Market Value: _____ Amount Owed: _____ Net Value or Equity: _____

More OTHER ASSETS attached? ☐ Yes ☐ No **Total Values:** _____

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VI. OTHER DEBTS NOT PREVIOUSLY LISTED *(Do not list account numbers)* Includes credit card balances, credit union loans, signature loans and other unsecured debt. *(If more than 5 debts, continue on a separate sheet)*

Creditor 1:
Creditor: _____
Party Named on Debt: _____ Premarital Account? _____
Valuation Date: _____ Monthly Payment: _____ Total Balance: _____

Creditor 2:
Creditor: _____
Party Named on Debt: _____ Premarital Account? _____
Valuation Date: _____ Monthly Payment: _____ Total Balance: _____

Creditor 3:
Creditor: _____
Party Named on Debt: _____ Premarital Account? _____
Valuation Date: _____ Monthly Payment: _____ Total Balance: _____

Creditor 4:
Creditor: _____
Party Named on Debt: _____ Premarital Account? _____
Valuation Date: _____ Monthly Payment: _____ Total Balance: _____

Creditor 5:
Creditor: _____
Party Named on Debt: _____ Premarital Account? _____
Valuation Date: _____ Monthly Payment: _____ Total Balance: _____

More DEBTS attached? ☐ **Yes** ☐ **No** **Total Debt Balances:** _____

VII. EXPECTED POST-DIVORCE LIVING EXPENSES SCHEDULE *(Do not include debts)*
Not necessary if maintenance or child support are not being claimed.

Do the parties' combined gross incomes exceed $15,000 per month? ☐ Yes ☐ No

If **NO**, do not include children's personal expenses below.

If **YES**, list children's personal expenses such as private school tuition, tutors, camps, activity fees, clothing, etc. on a separate sheet. ☐ Attached

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A. COMMON EXPENSES FOR FAMILY (Party and any children of the marriage)	
FOOD/GROCERIES FOR FAMILY (Non-entertainment)	
HOUSING	
Cable	
Garbage collection	
Electric, gas, propane & oil utilities	
Home maintenance & repairs	
Homeowner's insurance	
Household supplies	
Maid service	
Property taxes	
Rent or 1st mortgage	
2nd mortgage/home equity loan	
Telephone	
Mobile phone	
Vet/pet supplies	
Yard expense/maintenance	
Water/sewage	
TRANSPORTATION	
Gas and oil	
Liability insurance	
License/taxes/tag	
Payment/loan	
Repairs/maintenance	
Other – bus, taxi, tolls & parking	
OTHER FAMILY EXPENSES (list):	
Sub-total from attached other family expenses, if needed ☐ Attached	
SUBTOTAL (Column A)	

B. YOUR PERSONAL EXPENSES (not including any children's expenses)	
Church and charitable donations	
Clothing	
Cosmetics, hygiene & toiletries	
Disability insurance	
Dry cleaning & laundry	
Entertainment, including restaurants & movies	
Hair care (barber, salon, etc.)	
Internet access	
Life insurance (whole life or term)	
Manicures & pedicures	
Newspapers, magazines & books	
Professional dues or uniforms	
Sports, exercise, hobbies, crafts, etc.	
Travel (monthly average)	
MEDICAL	
Dental (including orthodontics)	
Eyeglasses, contacts & hearing aids, exams and testing	
Insurance (hospitalization)	
Medical doctor(s)	
Prescription medication	
OTHER PERSONAL EXPENSES (list):	
Sub-total from attached other personal expenses, if needed ☐ Attached	
SUBTOTAL FROM COLUMN B	
SUBTOTAL FROM COLUMN A	
SUBTOTAL FROM CHILDREN'S EXPENSE LIST ATTACHMENT	
GRAND TOTAL OF COLUMN A, B, AND ATTACHMENTS	

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VIII. OTHER

A. Special needs of parties:

B. Bankruptcy: _____

C. Lawsuits: _____

IX. REQUIRED ATTACHMENTS (to be sent ONLY to opposing party or opposing counsel and not filed with the Court):
To complete this section, you must attach all of the following documents and/or provide the requested information on a separate sheet and attach to this form. In the spaces provided, mark as follows:

"A" = to indicate that the requested document/information is attached.

"U" = to indicate that the requested document/information is unavailable (Provide explanation on a separate page)

"N/A" = if not applicable

A. PERSONAL INFORMATION OF BOTH PARTIES

B. INCOME AND EMPLOYMENT OF BOTH PARTIES

A, U, N/A	Item #	
	1.	Three (3) most recent paycheck stubs
	2.	Federal Income Tax Return for the last year filed
	3.	State Income Tax Return for the last year filed
	4.	Documentation of all other income for the past 48 months, including source of income and amount of income received year-to-date

C. CHILDREN

A, U, N/A	Item #	
	1.	Verification of work-related child care expenses
	2.	Verification of cost of health/dental insurance for children's portion (e.g. difference between cost of single and family plan)

D. ASSET SCHEDULES

A, U, N/A	Item #	
	1.	Most recent statement of each bank account
	2.	Most recent brokerage statement or documentation of purchase and/or value for each investment
	3.	Explanation of source of cash holdings, location and amount of cash
	4.	For each piece of real estate, copy of deed, documentation of all indebtedness (i.e., mortgage, home equity loan, liens, etc.) including unpaid balance and payoff (with date payoff amount obtained) for each debt, and current tax assessment
	5.	Declaration page of life insurance policies and documentation of cash surrender

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A, U, N/A	Item #	
	6.	Documentation of benefits accrued in pension, profit sharing, 401(k) or other retirement plans, including most recent statements of each such plan and the name, address and phone number of plan administrator
	7.	For each vehicle, provide amount of payoff of any indebtedness (including date payoff amount obtained) and copy of title
	8.	For each business interest, list name of business, extent of interest or title in business (i.e. owner, shareholder, partner, etc.), provide a copy of last income tax return filed by business and documentation of income earned (or portion received) through business during last twenty-four (24) months
	9.	Provide a list describing any other assets you have an interest in, including any documentation as to the value of the non-marital interest, date asset was acquired, and source of non-marital interest (trace and document non-marital funds used to acquire each asset)
	10.	**NON-MARITAL INTEREST.** For each asset in which you claim a non-marital interest, provide the basis and approximate value of non-marital claim. Documentation tracing any non-marital asset shall be produced if available, and if not currently available, shall be produced when available, or as specified by separate court order

E. DEBT SCHEDULE

A, U, N/A	Item #	
	1.	For each debt, provide the last statement or documentation of unpaid balance, or explain why documentation is not available
	2.	For each debt designated as “non-marital”, list the party you think should assume responsibility for said debt and why

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Client Name: _____ Initial Appointment Date: _____

DOCUMENTATION CHECKLIST

Documentation Description	Man-datory?	Not applicable?	Date Requested?	Date provided?	Action Required
Recent Tax Returns (Personal, corporate, partnerships, joint ventures, or other income tax returns, *state and federal*, including W-2s, 1099s, and K-1s) -- *Preferably for at least the last five years*	***YES***				
Three (3) most recent paycheck stubs or other evidence of current income sources	***YES***				
Bank Statements and other account info					
Financial Statements					
Loan Applications					
Broker's Statements					
Stocks, Bonds, Mutual Funds, Stock Options and Investment Account statements					
Pension, Profit Sharing, Deferred Compensation Agreement, and Retirement Plans					
Wills and Trust Agreements					
Life Insurance policies					
Outstanding Debts					
Accounts Payable and Receivable					
Real Property records *(deeds, mortgages, etc.)*					
Sale and Option Agreements					
Personal Property *(purchase receipts, appraisals, etc.)*					
Motor Vehicles *(titles, registrations, etc.)*					
Corporate Interests					
Partnership and Joint Venture Agreements					
Employment Records					
Fringe Benefits documentation					
Employment Contracts					
Business Records					
Charge Accounts					
Membership Cards					
Judgments and pleadings					
Gifts and Charitable Contributions					
Medical Bills					
Telephone and Long Distance Charges					
Tapes and Photographs					
Inventory of Safe Deposit Boxes					
Other:					

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PART C

Emotional Aspects of Your Legal Separation

Current Marital Circumstances

Check one of the following:

Did you expect this separation?		Do you want this separation/divorce?	
Yes, for a long time	____	Not at all	____
Yes, but only recently	____	Have mixed feelings	____
Unexpected	____	Want it very much	____
		No, but am resigned to it	____
		Feel it is for the best	____

CHECK ALL OF THE FOLLOWING WHICH APPLY:

Factors contributing to the decision to separate or divorce:

Domestic violence	____	Abuse or neglect of children	____
Recently had difficulty communicating	____	Job or school commitment	____
Always had difficulty communicating	____	Suspiciousness, jealousy	____
Differences in interests	____	Neglect of home	____
Differences in education level	____	Trouble with in-laws	____
Differences in ethnic or racial background	____	Drinking	____
Differences in expectations about marriage	____	Drug use	____
Differences in expectations about family life	____	Physical abuse	____
Changes in lifestyle, values	____	Depression	____
Lacked love for one another	____	Sexual abuse	____
Verbal abuse	____	Addiction to porn, on-line gaming, social networking (Facebook, MySpace, etc.)	____
Bored	____	Other (explain): _____	
Sexual difficulties	____	_____	
In love with another person	____	_____	
Financial problems	____		
Unfaithful, infidelity	____		

Major life events and/or changes occurring within the last twelve months:

Started school or training program	____	Nanny, au pair or aging parent left the household	____
Graduated from school or training program	____	Death of a household pet	____
Entered job market	____	Pregnancy	____
Changed job	____	Miscarriage	____
Lost job	____	Abortion	____
Moved residence	____	Fertility problems	____
Financial troubles	____	Changes in childcare	____
Increase in financial responsibilities	____	Children had trouble in school	____
Legal problems	____	Onset of menopause	____
Arrested and/or jailed	____	Mid-life crisis	____
Separation or divorce of friend or relative	____	Victim of a crime	____
Health problems (self, spouse, children)	____	Auto accident	____
Drinking or drug problems	____	Undertaken major new expenses	____
Began treatment for drinking or drug problems	____	Natural disaster	____
Began psychotherapy	____	Other (explain):	
Began new medications	____	_____	
Significant weight gain or loss	____	_____	
Nanny, au pair or aging parent joined the household	____	_____	

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LEVEL OF CONFLICT:

On a scale of 1-10, rate the level of conflict and anger in your marriage PRIOR TO THE INITIATION OF THE DIVORCE/LEGAL SEPARATION PROCESS:

BEFORE THE SEPARATION	Lowest									Highest
Level of conflict in marriage	1	2	3	4	5	6	7	8	9	10
Level of your anger	1	2	3	4	5	6	7	8	9	10
Level of your spouse's anger	1	2	3	4	5	6	7	8	9	10

NOW THAT YOU ARE IN THE DIVORCE/LEGAL SEPARATION PROCESS, rate the level of conflict and anger:

DURING YOUR LEGAL SEPARATION	Lowest									Highest
Level of conflict in marriage	1	2	3	4	5	6	7	8	9	10
Level of your anger	1	2	3	4	5	6	7	8	9	10
Level of your spouse's anger	1	2	3	4	5	6	7	8	9	10

PERSONAL CONCERNS AND PRIORITIES AT TIME OF SEPARATION OR DIVORCE

At this time of major change in our family:

I worry that I will _____

_____

I am concerned that my children will _____

_____

It's important to me that the separation/divorce process _____

_____

I think that my spouse will _____

_____

With regard <u>to the future</u>:

I worry I will _____

_____

I am concerned that my children will _____

_____

It is important to me that _____

_____

I think that my spouse will _____

_____

YOUR SUPPORT SYSTEM

The following are my current sources of **emotional** support:

Family and Friends	____	Religion or spiritual practice	____
Neighbors	____	Therapist/counselor	____
Co-workers	____	Lawyer	____

Other: _____

Your Occupation

What is your occupation? _____
Are you current employed? Yes/No
If yes, where are you employed? _____
How long have you held your current position? _____
How satisfied are you with your current job/work situation?

Very satisfied	_____	Moderately satisfied	_____
Moderately unhappy	_____	Extremely unhappy	_____

Your Personal History

Have you ever had any physical or mental illnesses, significant health problems or serious accidents that affected you for an extended period of time? If so, please list:

_____

_____

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Your health in early childhood was generally:
Good ____ Fair ____ Poor ____

At present, your health is generally:
Good ____ Fair ____ Poor ____
Special Health Concerns: _____

How long ago was your last physical? _____

Are you concerned about your own drug/alcohol use or that of your partner? Yes/No

If yes, please explain:

_____

_____

List all drugs you are currently taking (including aspirin, vitamins, sleeping pills, etc.):

_____

_____

_____

Are you currently in couples, family or individual therapy or counseling? Yes/No
If yes, with whom? _____

Have you previously been in couples, family or individual therapy or counseling? Yes/No

If yes, what type of counseling was it? _____

For how long? _____

With whom? _____

Your Income

What is the approximate gross monthly income you have to live on at the present time? $_____

Describe changes, if any, in your income since your separation: _____

_____

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