

FAMILY LAW – FORM INTERROGATORIES WORKSHEET

Please have this completed and sent to our office no later than: _____

1. Personal History

- a. What is your full legal name?
- b. What is your current residence address?
- c. What is your current work address?
- d. What are the last four digits of your social security number?
- e. Have you ever used any other names?
- f. If you have used other names, what dates did you use those names?

2. Agreements

- a. Did you and your spouse make any agreements either during your marriage, or after separation that affected the disposition of the assets or debts in your marriage, or spousal support?
- b. If so, what date was the agreement made?
- c. If so, was the agreement written or oral?
- d. If you have a copy of the agreement, please provide it with this questionnaire.

3. Legal Actions

- a. Are you the party to any legal proceedings, other than this one?
- b. If yes, what is your involvement with the case?
- c. If yes, what court is it being heard in?
- d. If yes, what is your case number?
- e. If yes, can you describe briefly what the case is about?

4. Persons Sharing Residence

- a. Do you share your residence with anyone? This includes children, roommates, and significant others, if applicable.
- b. If so, what is their name, age and relationship to you?

5. Support Provided Others

- a. Have you provided support to any other person in the last 12 months?
- b. If so, what is their name, age, address and relationship to you?

- c. Please also provide an estimate of the amount of funds you have provided.

6. Support Received For Others

- a. Have you received support during the last 12 month for another?
- b. If so, what is their name, age, address and relationship to you?

- c. Please also provide the amount you have received.

7. Current Income

- a. List all of the income you have received in the last 12 months annually, and on average for each month.

- b. Please list the source of this income, and the basis of how you calculated it, and the total amount you received from each source.

- c. Please provide you last three paycheck stubs.

8. Other Income

- a. During the past three years, have you received any cash or property other than the source you have identified in #7?
- b. If so, can you provide the source you received the cash or property?

- c. The date you received the cash or property?

- d. And the nature and value of the cash or property?

9. Tax Returns

- a. Please provide your taxes for the last three years.

10. Schedule of Assets and Debts

- a. Please fill out the attached form – FL-142. If you did not receive this form, please contact our office so that we can provide it to you as soon as possible.

11. Separate Property Contentions

Certain assets, including bank accounts, investment accounts, retirement accounts, and property, are considered separate property per the Family Code. Is there any asset that you believe could be separate property? This could be an asset inherited by you, acquired or owned by you prior to marriage, or a property acquired or maintained by separate funds, whether during marriage or before.

If there are any such assets please provide background facts, and an explanation as to why you believe it is separate property.

12. Property Valuations

- a. During the past 12 months have you had any of the following completed on any assets?
 - i. Written offers to purchase?
 - ii. Written appraisals?
- b. If so, please identify the document, including details of the appraising party of the party making the offer, date, and amount.

13. Property Held by Others

- a. Is there any property held by any third party in which you have an interest, or over which you have any control?
- b. If so, please describe and identify the asset.
- c. Please also provide a value as to the asset, and the basis for that valuation.
- d. Lastly, please provide the name of the third party holding the asset for you.

14. Retirement and Other Benefits

- a. Do you have any interests in any disability, retirement, profit-sharing or deferred compensation plan?
- b. If so, please provide the following information for each plan:
 - i. Plan company, and account number.
 - ii. The name, address and telephone number of the administrator. If you are not sure where to get this information, please indicate.

15. Claims of Reimbursement

The Family Code allows for certain funds to be reimbursed to you. These can be separate property funds used towards the expense or purchase of a community property asset, or separate property funds used towards the expense of community assets. Do you believe that you have any claims for reimbursement?

If so, please provide facts and an explanation as to why you believe you are entitled to reimbursements.

16. Credits

If you have paid for certain community property debts or expenses with your separate property after separation, you may be entitled to credits. Do you believe this could be the case? If so, please provide the following information:

- a. The source of payment – whether it was your income, borrowed funds, a separate property account.

- b. The creditor – who did you pay the money to?

- c. Date and amount paid.

17. Insurance

- a. Do you have any insurance policies that cover you, your children (if applicable) or your assets? This includes health, life, auto, and disability. If so, please provide the following information for each policy:

	Health	Life	Auto	Disability
Policy Type				
Policy Number				
Name of Company				
Agent and contact information (if any)				

18. Health

- a. Are there any physical or emotional conditions that limit your ability to work?
- b. If so, please provide additional facts and information.

19. Children's Needs (If applicable)

- a. Do any of your children, or your child, have any special needs?
- b. If so, please identify the child with the need, and the reason for the need.

- c. Please also provide the cost of the need.

- d. Please also provide the expected duration of the need.

20. Attorney's Fees

- a. What is the total amount you have paid for attorney's fees, thus far?
- b. What was the source of the money paid?

21. Gifts

- a. Have you made any gifts in the last 24 months, without the consent of your spouse?
- b. If so, what was the value of the gift, and the recipient?