
YOUR DETAILS

Your Full Names: _____

Residential Address: _____

Postal Address: _____

Telephone: _____

Mobile: _____

Email Address: _____

Occupation: _____

Date of Birth: _____

YOUR PARTNERS DETAILS

| | |
|---------------------------|--|
| Full Names: Mr / Mrs / Ms | |
| Residential Address: | |
| Postal Address: | |
| Telephone: | |
| Mobile: | |
| Occupation: | |
| Date of Birth: | |
| Solicitor's Name: | |
| Solicitor's Company: | |
| Solicitor's Telephone: | |
| Solicitor's Email: | |
| Accountant's Name: | |
| Accountant's Company: | |
| Accountant's Telephone: | |
| Accountant's Email: | |

MARRIAGE DETAILS

| | | |
|--|--|--|
| Your Prior Marriage (i.e. If you were married to another person before this marriage) | Marriage Date: | |
| | Divorce Date: | |
| | Children: | |
| Your Ex Partner's Prior Marriage (i.e. if your former partner was married to another person prior to your marriage) | Marriage Date: | |
| | Divorce Date: | |
| | Children: | |
| Marriage Date: | | |
| Place of Marriage: | | |
| Wife's Maiden Name: (if applicable) | | |
| Prior Cohabitation: | | |
| Marriage Certificate: | Attached: <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| The date of separation: | | |
| The date of which you physically exited the property from your partner or they from your home: | | |

INCOME & EARNING CAPACITY

| | |
|---|--|
| What is your annual gross income? | |
| What is the name of your employer? | |
| What is your ex partner's annual gross income? | |
| What is the name of your ex partner's employer? | |

YOUR CHILDREN

| | |
|-------------------------|--|
| Child #1 | |
| Full Name: | |
| Date of Birth: | |
| Resides With: | |
| School: | |
| Childcare Arrangements: | |
| Child #2 | |
| Full Name: | |
| Date of Birth: | |
| Resides With: | |
| School: | |
| Childcare Arrangements: | |
| Child #3 | |
| Full Name: | |
| Date of Birth: | |
| Resides With: | |
| School: | |
| Childcare Arrangements: | |
| Child #4 | |
| Full Name: | |
| Date of Birth: | |
| Resides With: | |
| School: | |
| Childcare Arrangements: | |

SUMMARY OF ASSESTS

| Asset Please list all assets that you and your partner have. | Value Estimate the dollar value | Ownership Who owns the assets? |
|--|---|--|
| Home Address: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Other Real Estate Address: Address: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Primary Bank Account Bank: Account Name: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Other Bank Accounts Bank: Account Name: Bank: Account Name: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Cars / Caravans / Boats Vehicle: Type / make: Vehicle: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company |

| | | |
|---|--|--|
| Type / make: Vehicle: Type / make: | | <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Shares | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Bonds | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Life Insurance Policies Name of Company: Type of Policy: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Superannuation Funds Name of Fund: Name of Fund: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |

SUMMARY OF LIABILITIES

| Liabilities | Value Estimate the dollar value |
|---|---|
| Mortgage Bank: Account Name: | |
| Loans Bank: Account Name: | |
| Credit Card Bank: Account Name: | |
| Other Accounts Bank: Account Name: Bank: Account Name: | |

Do you have a family trust? Yes No

Name: _____

Trustee: _____

Please provide a copy of your trust deed.

Are you a Company Director / Shareholder?

Company: _____

Position: _____

Shareholding: _____

Do you have a pre-paid Funeral Bond/Plan, Pre-Arranged Funeral Details?

Name of Pre-Paid Funeral: _____

Owned by: _____

Estimate Value: \$ _____

Details of Pre-Arranged Funeral: _____

DOCUMENTS

| Documents Please provide your documents at your earliest convenience. We will scan the documents onto our system and return the originals to you for your safe keeping. Please do not dispose of any original document until after the settlement of your matter. | Provided (Please tick) |
|---|----------------------------------|
| Three most recent tax returns and notices of assessment | |
| Bank statements for the past 12 months | |
| Superannuation Statement | |
| The three latest financial statements and tax returns for a relevant company | |
| Such company's latest annual return of directors and shareholders | |
| Partnership agreement and three latest financial statement for any partnership | |
| Any business activity for the twelve months before the first court date | |
| Market appraisal or valuation of any property | |

CLIENT'S ASPIRATIONS

Please advise what your aspirations are, any notes and proposed orders in relation to the following:

Children:

Assets:

Liabilities:

CASES & ORDERS

Are there any ongoing cases in court about family law, child support, family violence or child welfare that involve the parties or any of the children? Yes No

If yes, please provide brief details including court, next court date, parties and nature: _____

Are there any existing orders, agreements, parenting plans or undertakings to a court about family law, child support, family violence or abuse in relation to a child, or child welfare concerning the parties or children? Yes No

If yes: Order Parenting Plan Undertaking Agreement

