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FAMILY LAW CLIENT'S HOMEWORK

Attached you will find an outline of information that you will need to gather before our next meeting. The list is long and tedious but the information is vital to preparing your case. Domestic cases are always difficult, and no one comes out a winner. The more information I have, the better legal advice I can give you.

If you have any questions about the information that I have requested, please feel free to call me or email me.

MARITAL INFORMATION

1. Write a narrative of your marriage in general terms going back as far as you like.
2. Write a detailed description of all that has transpired within your marriage in the last couple of years.
 - a. Include dates and places; what was said and done.
 - b. Note any witnesses to particular events – include their names, addresses and phone numbers.
3. List every complaint that you have about your spouse.
4. List every complaint that your spouse may have about you.
5. Write what you want the outcome of this conflict to be and what are your expectations.

CUSTODY INFORMATION

6. Write a narrative of a day in the life of your children.
 - a. Where do they live, go to school, after school?
 - b. In what activities are they involved?
 - c. List relatives that are involved in your children's lives.
 - d. Discuss their current living situation and environment. Is the current living situation in the children's best interest? Why or why not?
7. What are the current child care costs?
 - a. Day care.
 - b. Medical costs.
 - c. Activities.
 - d. Other costs.
8. Write why you want custody and why you think that you are fit and proper to have custody.
9. Explain why it would be in your children's best interest to be with you.
10. Write out your day-to-day plan for the children if you get custody.

FINANCIAL INFORMATION

11. Home:

- a. Fair Market Value
- b. Mortgage Balance (and second mortgage or prime equity line balance if there is one.
- c. Amount of Payments on each mortgage and who makes the payments (and who has made them in the past.

12. Automobiles:

- a. Make and Year of each vehicle.
- b. Name of person or persons who hold titles.
- c. Who primarily drives each vehicle.
- d. Amount of payment on each vehicle; who make the payment and balances on each.
- e. If leased, the monthly payment, expiration date and payoff.

13. Bills and Indebtedness:

- a. To whom, how much, and for what each bill is owed.
- b. Who incurred each bill, and who signed the notes or credit card application.
- c. Which obligations, if any, are purchase contracts for furniture, or are liens or encumbrances on property, either real or personal.

14. Intangible Property:

- a. Stocks, bonds, IRA's, 401(k)s, and stock options.
- b. Savings accounts.
- c. Mortgages or notes held.
- d. Life insurance policies, whether each is whole life or term, and amounts of loans on whole life policies.

15. Other Assets:

- a. Campers, trailers, motorcycles, motor homes, antique cars, or other vehicles.
- b. Investments properties.
- c. Vacation homes.
- d. Jewelry
- e. Coins, stamp and gun collections, and other collectibles.
- f. Pension and Retirement rights.
- g. Personal injury settlements (pending).

- h. Patent and copyrights.
- i. Any other items you can think of.

16. Please gather and bring the following:

- a. State and federal income tax returns and state intangible returns for at least two years.
- b. Financial statements prepared for any lending institutions during the past three years.
- c. Banking statements and cancelled checks for the past year.
- d. Savings account and credit union account passbooks or records.
- e. Records of stock transactions during the past year.
- f. Life Insurance – the name of the company, the policy number, death benefits, cash value, amount of outstanding loans, ownership and the names of beneficiaries.
- g. Benefits (actual or contingent) from any estate or trust.
- h. Interest in pension or profit sharing plans. Obtain a copy of the plan and printouts showing the interests in it.
- i. Fringe benefits provided by you or your spouse's employer.
- j. Paperwork showing any miscellaneous properties: loans, settlements, etc.
- k. Corporate or partnership returns for the past two years.
- l. Paperwork on investment properties showing value, mortgages, and any income derived from them.
- m. Medical and automobile insurance.