

# Katie Johnson PLLC

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## Intake form for Divorce Case

Date: \_\_\_\_\_

Referred by: \_\_\_\_\_

Full name \_\_\_\_\_ Social Security Number \_\_\_\_\_

Address \_\_\_\_\_ How long there? \_\_\_\_\_

Telephone: Home \_\_\_\_\_, Cell \_\_\_\_\_, Work \_\_\_\_\_

Instructions for billing or messages  
\_\_\_\_\_  
\_\_\_\_\_

### Case Information

Maiden name \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Military Services? Yes or No

Employer \_\_\_\_\_

Average Income per month \_\_\_\_\_

### Adverse Party

Name \_\_\_\_\_ SS# \_\_\_\_\_

Address \_\_\_\_\_ How long there? \_\_\_\_\_

Maiden name \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Military Services? Yes or No

Employer \_\_\_\_\_

Average Income per month \_\_\_\_\_

Attorney? \_\_\_\_\_ Deadlines? \_\_\_\_\_

Will they accept service? \_\_\_\_\_

Does wife want to change name? \_\_\_\_\_

### Children:

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Name: \_\_\_\_\_ DOB \_\_\_\_\_ Age \_\_\_\_\_

Has anyone else had custody of these children in the past 5 years?  
\_\_\_\_\_  
\_\_\_\_\_

Are there any other proceedings regarding custody or visitation with children?

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Are there any pending proceeding anywhere else?

Marriage-

Date of Marriage \_\_\_\_\_

Place of marriage \_\_\_\_\_

Date of Separation \_\_\_\_\_

Living together \_\_\_\_\_

Have you received any support from spouse since separation? If yes how much and when?

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Any physical violence or harassment?

Assets and debts

Gifts or inheritance?

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Corporations or partnerships?

Real Property?

Address: \_\_\_\_\_ Ownership \_\_\_\_\_

Value: \_\_\_\_\_ who has an interest in this? \_\_\_\_\_

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Personal Property? Where at and values?

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Life insurance?

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401 K?

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Retirement?

Cash and Bank accounts?

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Furniture:

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Appliances:

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Other assets:

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ASSET CHECKLIST

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> antiques                | <input type="checkbox"/> guns                   | <input type="checkbox"/> profit-sharing plans |
| <input type="checkbox"/> artwork                 | <input type="checkbox"/> jetski                 | <input type="checkbox"/> scanner              |
| <input type="checkbox"/> boats, motors, trailers | <input type="checkbox"/> jewelry                | <input type="checkbox"/> silver               |
| <input type="checkbox"/> bonds                   | <input type="checkbox"/> musical instruments    | <input type="checkbox"/> snowmobiles, trailer |
| <input type="checkbox"/> business interests      | <input type="checkbox"/> pending litigation     | <input type="checkbox"/> stocks               |
| <input type="checkbox"/> china                   | <input type="checkbox"/> pension plans          | <input type="checkbox"/> stock options        |
| <input type="checkbox"/> collections             | <input type="checkbox"/> personal injury claims | <input type="checkbox"/> tax refunds          |
| <input type="checkbox"/> computer and printer    | <input type="checkbox"/> pets                   | <input type="checkbox"/> tools                |
| <input type="checkbox"/> crystal                 | <input type="checkbox"/> photographic equipment | <input type="checkbox"/> travel trailer       |
| <input type="checkbox"/> electronics             | <input type="checkbox"/> photo albums           | <input type="checkbox"/> workers' comp claims |
| <input type="checkbox"/> fax                     |   |   |
| <input type="checkbox"/> farm/acreage equip.     |   |   |

Business Interests:

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> accounts receivable         | <input type="checkbox"/> joint venture interests       | <input type="checkbox"/> royalties             |
| <input type="checkbox"/> agricultural cooperatives   | <input type="checkbox"/> limited partnership interests | <input type="checkbox"/> sole proprietorships  |
| <input type="checkbox"/> closely held stock          | <input type="checkbox"/> livestock and poultry         | <input type="checkbox"/> syndication interests |
| <input type="checkbox"/> commissions due             | <input type="checkbox"/> machinery                     | <input type="checkbox"/> tax shelters          |
| <input type="checkbox"/> copyrights                  | <input type="checkbox"/> office equipment and contents | <input type="checkbox"/> trademarks            |
| <input type="checkbox"/> crops                       | <input type="checkbox"/> partnership interests         | <input type="checkbox"/> others                |
| <input type="checkbox"/> farm machinery              | <input type="checkbox"/> patents                       |  |
| <input type="checkbox"/> installment sales contracts |  |  |

Debts:

Creditor	Balance	In whose name?	Who makes payments?

Debt checklist:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> bank loans           | <input type="checkbox"/> credit union           | <input type="checkbox"/> past utilities     |
| <input type="checkbox"/> child support        | <input type="checkbox"/> family loans           | <input type="checkbox"/> pending litigation |
| <input type="checkbox"/> cosigned obligations | <input type="checkbox"/> financial institutions | <input type="checkbox"/> previous alimony   |
| <input type="checkbox"/> credit cards         | <input type="checkbox"/> past rental            | <input type="checkbox"/> private loans      |

Any Income not previously mentioned?

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> ADC           | <input type="checkbox"/> interest         | <input type="checkbox"/> social security    |
| <input type="checkbox"/> alimony       | <input type="checkbox"/> military pension | <input type="checkbox"/> unemployment comp. |
| <input type="checkbox"/> annuity       | <input type="checkbox"/> disability       | <input type="checkbox"/> wages              |
| <input type="checkbox"/> child support | <input type="checkbox"/> military reserve | <input type="checkbox"/> workers' comp.     |
| <input type="checkbox"/> dividends     | <input type="checkbox"/> salary           | <input type="checkbox"/> other              |
| <input type="checkbox"/> foodstamps    |   |   |

Other Issues?

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