

LANCASTER LAW OFFICE COLLABORATION DATA

If any question does not apply to your circumstance, please put an X in the answer box. Sometimes we are fishing for legally significant information you may not have thought to tell us. We need to know that the question does not apply to your circumstance.

Thanks.

BRAD AND KIM LANCASTER.

DOCUMENTS TO GATHER	
1.	Federal income tax returns (joint and/or separate) for last three years with W-2 Forms, and all attached schedules
2.	Your pay stubs for the last six months. Copies of your spouse's paystubs for the last six months, if you have them.
3.	Copy of your current check register (must include activity for the last six months)
4.	Most recent annual statement of pension or retirement benefits for each spouse
5.	Savings passbook (both joint and separate)
6.	Certificates of deposit, Treasury bills, stock statements or certificates, portfolio report, name of stock broker, or any information relating to similar financial instruments
7.	Financial statements given to banks or lending institutions for a recent loan
8.	Monthly bank statements for each checking and savings account for the last six months (joint and separate)
9.	Joint and/or separate charge card statements for the last six months (all accounts)
10.	Warranty deeds, purchase and sale contracts, title insurance, and other documents establishing ownership of real estate (e.g., your home or summer cabin)
11.	Title certificates and registration statements for cars, trucks, recreational vehicles, boats, etc.
12.	Annual statements of medical and life insurance benefits, and profit sharing plans and so forth for each employer (both yours and your spouse's)
13.	If self-employed or own a business: most recent tax return of business, annual profit and loss statement, most current Washington State Excise Tax Return.
14.	If you or your spouse are a beneficiary to a trust, a copy of the trust instrument and the name and address of the trustee.
15.	If previously divorced or subject to a child support order, copies of Decree of Dissolution, Property Settlement Agreement, and (if applicable) Order of Child Support

16.	Client Name	First:	Middle:	Last:
		Nickname:		
		Title: Mr., Mrs., Ms., Dr., none (circle one)		
17.	Number of Children			
18.	Client Home Phone			
19.	Client Cell Phone/Pager			
20.	Client Fax			
21.	Client Address			
22.	Client Previous Addresses in the last 5 years			
23.	Client's email address			
24.	Client Social Security Number			
25.	Client Driver's License Number	Need copy of license		
26.	Client's Height, Weight, Hair Color, Eye Color			
27.	Client Race			
28.	Client Employer			
29.	Employer Phone			
30.	Employer Address			
31.	Client Birth Date			
32.	Client City and State of Birth			
33.	Client maiden name and other previous names (if any)			
34.	Does client live in city limits?			
35.	Spouse's Name	First:	Middle:	Last:
		Nickname:		
		Title: Mr., Mrs., Ms., Dr., none (circle one)		
36.	Spouse's Home Phone			
37.	Spouse's Cell Phone/Pager			
38.	Spouse's Fax			
39.	Spouse's Address			
40.	Spouse's previous addresses in the last five years			
41.	Spouse's email address			
42.	Spouse's Social Security Number			

43.	Spouse's Driver's License Number	Need copy of license, if available
44.	Spouse's Height, Weight, Hair Color, Eye Color	
45.	Spouse's Race	
46.	Spouse's Employer	
47.	Employer Phone	
48.	Employer Address	
49.	Spouse's Birth Date	
50.	Spouse's City and State of Birth	
51.	Spouse's maiden name and other previous names (if any)	
52.	Does Spouse live in city limits?	
53.	Date of Marriage	
54.	City, County, and State of Marriage	
55.	Date of Separation (when you quit living together as husband and wife; if this is complicated, please explain.)	
56.	Dependent Children	Children 18 years or younger that are natural, step, or adopted (oldest to youngest)
57.	Person paying Child Support	Husband, Wife (circle one)
58.	Person receiving Child Support	Husband, Wife (circle one)
59.	Child #1 Name: (oldest child first)	First: Middle: Last:
60.	Age:	
61.	Birth date:	
62.	Social Security Number:	
63.	Address at which child lives:	
64.	Name of Child's Mother:	
65.	Name of Child's Father:	
66.	List the name of each person with whom the child has lived in the last five years, the dates the child lived there, and the	

	address at which the child lived with that person. If needed, use the back of this page.			
67.	Child #2 Name:	First:	Middle:	Last:
68.	Age:			
69.	Birth date:			
70.	Social Security Number:			
71.	Address at which child lives:			
72.	Name of Child's Mother:			
73.	Name of Child's Father:			
74.	List the name of each person with whom the child has lived in the last five years, the dates the child lived there, and the address at which the child lived with that person. If needed, use the back of this page.			
75.	Child #3 Name:	First:	Middle:	Last:
76.	Age:			
77.	Birth date:			
78.	Social Security Number:			
79.	Address at which child lives:			
80.	Name of Child's Mother:			
81.	Name of Child's Father:			
82.	List the name of each person with whom the child has lived in the last five years, the dates the child lived there, and the address at which the child lived with that person. If needed, use the back of this page.			
83.	Child #4 Name:	First:	Middle:	Last:
84.	Age:			
85.	Birth date:			
86.	Social Security Number:			
87.	Address at which child lives:			
88.	Name of Child's Mother:			
89.	Name of Child's Father:			

<p>90. List the name of each person with whom the child has lived in the last five years, the dates the child lived there, and the address at which the child lived with that person. If needed, use the back of this page.</p>	
<p>91. Child #5 Name:</p>	<p>First: Middle: Last:</p>
<p>92. Age:</p>	
<p>93. Birth date:</p>	
<p>94. Social Security Number:</p>	
<p>95. Address at which child lives:</p>	
<p>96. Name of Child's Mother:</p>	
<p>97. Name of Child's Father:</p>	
<p>98. List the name of each person with whom the child has lived in the last five years, the dates the child lived there, and the address at which the child lived with that person. If needed, use the back of this page.</p>	
<p>99. Additional Dependent Children</p>	<p>Please list any additional dependent children and their information on the back of this page.</p>
<p>100. Adult Children: Do you or your spouse have any adult children? If so, please list each adult child's name, age, and name of mother and father.</p>	
	<p>WHAT YOU WANT</p>

101.	Do you want: (circle)	Dissolution? Legal Separation? Declaration of Invalidity (Annulment)?
102.	Are you certain you want a divorce? Why?	
103.	Have you tried to resolve your problems with your spouse by counseling or talking with friends or your religious leader? If so, tell us when and where.	
104.	Do any of your children have extraordinary medical or educational needs? If so, describe them.	
105.	Describe your emotional state with respect to your spouse:	Friendly. Disturbed. Disgusted. Angry. Ready to Fight. Homicidal.
106.	Are you seeing a counselor about your emotional state at present?	
107.	Do you have any mental or physical illnesses we should know about? If so, list them.	
108.	Are you taking any medications?	
109.	Circle the words that describe your relationship with your spouse?	Amicable, friendly, collaborative, fixable, hopeful; Stressed, unpleasant, difficult, nasty, unfaithful, troubling; Painful, bitter, harsh, dangerous, heartless, deadly. <i>Pick another word:</i>
110.	Describe briefly your spouse's relationship with your children.	
111.	Have you or your spouse used illegal drugs or abused prescription drugs in the last five years?	

112.	Have you or your spouse struck one another or the children in the last five years?	
113.	Have either you or your spouse been diagnosed with mental illness of any sort by a psychiatrist?	
VITAL STATISTICS INFORMATION		
114.	Client's Mother's Maiden Name	
115.	Spouse's Mother's Maiden Name	
PREGNANCY		
116.	Are you or your spouse pregnant at this time?	
117.	Who is the father of the fetus?	
118.	How do you know that person is the father of the fetus?	
119.	What is expected birth date?	
NAMES		
120.	Do you want to change your name?	
121.	If so, to what?	
122.	Does your spouse want to change his or her name?	
123.	If so, to what?	
FINANCIAL DECLARATION INFORMATION		
<p>We have to determine whether each piece of property you own is separate or community property. Roughly put, community property is anything you acquired while married with the fruits of your labors. Separate property may become community property if it is untraceably commingled with community property. Separate property is property you owned before the marriage, or acquired since the marriage became defunct. One can also acquire separate property by gift, inheritance, or court award for personal injury pain and suffering. Make sure in the sections that follow that you list all property you and your spouse own.</p>		
124.	Your occupation:	

125.	The highest year of education completed:	
126.	If you completed one or more college degrees, name the college, your field of study, and year you graduated for each.	
127.	Were you married at the time you performed your studies and completed your education?	
128.	If so, what was the source of funds by which your educational expenses were paid?	
129.	How did you pay your monthly bills during your education?	
130.	Do you have any special vocational skills?	
131.	What is your present gross monthly income?	
132.	What do you expect your income to be in five years?	
133.	What do you expect your income to be in ten years?	
134.	Have you ever filed for bankruptcy?	
135.	If so, when and where?	
136.	Has your spouse ever filed for bankruptcy?	
137.	If so, when and where?	
138.	Are you presently employed?	
139.	Name of employer:	
140.	Address of Employer:	
141.	When did you start work there?	Month: Year:
142.	Have you provided us at least one current pay stub?	
143.	Circle how are you paid?	Weekly. Twice Monthly. Monthly.
144.	If you are not paid in any of these time periods, how are you paid?	
145.	Do you pay any mandatory union or professional dues?	
146.	Do you contribute to any pension plan?	
		UNEMPLOYMENT
147.	Are you presently	

	unemployed?	
148.	When did you last work?	Month: Year:
149.	What were your gross earnings at your last job?	
		INTEREST INCOME
150.	Do you receive interest income?	
151.	From what source?	
152.	How much income do you receive?	
153.	On what schedule do you receive this income?	
		BUSINESS INCOME
154.	Do you own a business?	
155.	What is the name of that business?	
156.	Where is that business located?	
157.	How and when do you receive money from that business?	
158.	Profit or Loss last year:	
159.	Net worth of business:	
160.	Where are the business books kept?	
161.	Who is CPA for business?	
162.	If business is a corporation, who owns shares?	
163.	Are you an officer or board member of the corporation?	
164.	Do you or your spouse have any business-related benefits?	Airline Miles: Reimbursable Travel Expenses:
165.	Have you provided us with IRS 1040, Schedule C for the last three years with respect to this business?	
		ASSETS AVAILABLE

166.	How much cash do you have now?	
167.	State each bank account you have, the name of the bank, the balance in that account.	
168.	Has your spouse taken money from that account since the date of your separation?	
169.	If so, how much, from which account(s), and when?	
170.	Do you own stocks or bonds?	
171.	If so, list the names of the stocks and the number of shares you own on the back of this page.	
172.	Do you have life insurance on yourself?	
173.	How much, name of insurer.	Please provide the insurance policy and any riders.
174.	Does your spouse have life insurance on himself or herself?	
175.	How much, name of insurer.	Please provide the insurance policy and any riders.
176.	Do you have a pension from any employer, present or past?	
177.	Name the pension plan.	
178.	Name the employer and dates of your employment.	
179.	The present value of your pension.	Please provide most recent statement.
180.	Does your spouse have a pension from any employer, present or past?	
181.	Name the pension plan.	
182.	Name your spouse's	

	employer and dates of your spouse's employment.	
183.	The present value of spouse's pension.	Please provide most recent statement.
184.	Do you have any IRAs?	
185.	If so, specify for each:	What institution holds the IRA: The present value of the IRA: The IRA is invested in (circle): Stocks, Bonds, Money Market, GovBonds Please provide most recent statement.
186.	Does your spouse have any IRAs?	
187.	If so, specify for each:	What institution holds the IRA: The present value of the IRA: The IRA is invested in (circle): Stocks, Bonds, Money Market, GovBonds Please provide most recent statement.
188.	Do you or your spouse own any CDs, T-Bills, or other investments or securities?	
189.	List all benefits presently being received by you or your spouse:	Social Security: Tribal Benefits: Veterans Benefits: Railroad Retirement Benefits: Insurance Benefits:
190.	Do you have any other sources of income? If so, please list them.	Trusts, annuities, profit-sharing, etc.
191.	Do you own any real estate?	
192.	If so, for each parcel, what is the street address of each parcel? Use the back of this sheet if necessary.	Please provide copy of deed or other document with full legal description of parcel.
193.	How did you come to own each piece of real estate?	
194.	What did you pay for the parcel?	
195.	What is the fair market value of the parcel now?	
196.	What is the assessed value now?	

197.	What is the monthly payment on this parcel, if any?	
198.	What company provides homeowner's insurance on this parcel? Provide address and phone.	
199.	What is the condition of this parcel?	
200.	Do you own any automobiles?	
201.	If so, please provide all the information requested for each vehicle.	<p>Vehicle #1: Make, Model and Year: Vehicle Registration number: Date acquired: Purchase price: Estimated present value: General Condition: Amount owed: Who holds note?</p> <p>Vehicle #2: Make, Model and Year: Vehicle Registration number: Date acquired: Purchase price: Estimated present value: General Condition: Amount owed: Who holds note?</p> <p>Vehicle #3: Make, Model and Year: Vehicle Registration number: Date acquired: Purchase price: Estimated present value: General Condition: Amount owed: Who holds note?</p>
202.	Do you own any boats and trailers?	
203.	If so, specify for each:	Make and year: Registration number: Date acquired: Purchase price: Fair market value: Amount owed: Who holds note?
204.	Do you own season tickets for any sports venues?	
205.	If so, specify for each:	Organization:

		Date acquired: Purchase price: Fair market value: Amount owed: Monthly fees:
206.	Do you or your spouse have any airline frequent flyer miles or points in any non-airline programs?	
207.	If so, specify for each:	Name of person (you or your spouse): Name of airline or non-airline program: Number of miles or points:
208.	Do you or your spouse own any life insurance?	
209.	If so, specify for each policy:	Who owns policy: Who is beneficiary: Face amount of policy: Cash value of policy: Whether term or whole life: Loans taken against cash value: Balance on and terms of loan against cash value:
210.	Do you own any Promissory Notes or other Unsecured Debt?	
211.	If so, please specify amount of obligation, debtor's name, address, and phone, and monthly payment made to you for each such instrument.	Please provide a copy of each note or other instrument.
212.	Do you or your spouse have any lawsuits or potential lawsuits in which either of you are or might be plaintiffs?	
213.	If so, please specify these claims and the circumstances during which they arose.	
214.	Do you anticipate receiving any money in the next year by means of gift or inheritance?	
215.	Please list on the back of this page any and all household items the value of which exceeds \$200, and specify as best you are able:	What the article is: How much it cost: Its fair market value now: Amount owed on the item: Who should receive the item in the divorce:
216.	Do you have any property which has not been listed somewhere in this	

questionnaire?	
MONTHLY EXPENSES	
217.	Monthly rent, primary house mortgage/contract payments
218.	Monthly payments on secondary or other mortgages/contracts
219.	Property taxes/homeowner's insurance (if not in monthly payment)
UTILITIES	
220.	Heat:
221.	Electricity:
222.	Water, Sewer, Garbage:
223.	Telephone:
224.	Cell Phone:
225.	Cable:
226.	Internet Access:
227.	Other Utilities:
FOOD AND HOUSEHOLD EXPENSES	
228.	Monthly food costs:
229.	Number of persons fed:
230.	Pet costs:
231.	Tobacco:
232.	Alcohol:
233.	Household supplies (e.g., TP, dish soap, detergent, paper towels, Kleenex, light bulbs):
234.	Other household costs:
COSTS RELATED TO CHILDREN	
235.	Day Care:
236.	Additional Baby-sitting:
237.	Children's clothing:
238.	Children's tuition:
239.	Other child-related expenses:
TRANSPORTATION COSTS	
240.	Vehicle payment/lease payment:
241.	Vehicle insurance:
242.	Gas, oil, ordinary maintenance:
243.	Parking:
244.	Bus Passes:

245.	Other transportation expenses:	
		HEALTH COSTS
246.	Monthly health insurance costs:	
247.	What is the deductible on your health insurance?	
248.	Monthly uninsured costs	Dental: Orthodontic: Medical: Eye care: Other:
		PERSONAL EXPENSES
249.	Your monthly clothing costs:	
250.	Your hair care/personal care costs:	
251.	Club dues:	
252.	Entertainment (movies, meals eaten out, other (please specify):	
253.	Education costs:	
254.	Books, newspapers, magazines:	
255.	Photographs:	
256.	Gifts:	
257.	To whom might you give gifts, and for what occasions?	
258.	Other Personal Costs:	
		MISCELLANEOUS EXPENSES
259.	Life Insurance	
260.	(if not deducted from income)	
261.	Other:	
262.	Other:	
263.	Other:	
264.	Other:	

LIABILITIES	
INSTALLMENT DEBT	
	This is usually credit card revolving accounts. But this also might include personal debts to friends or family, educational debt payments (Continue on the back of this page, if necessary.)
265. Name of creditor #1:	
266. Description of debt:	
267. Balance on account:	
268. Amount of monthly payment:	
269. Date of last payment:	
270. Have you provided us with your most current statement?	
271. Name of creditor #2:	
272. Description of debt:	
273. Balance on account:	
274. Amount of monthly payment:	
275. Date of last payment:	
276. Have you provided us with your most current statement?	
277. Name of creditor #3:	
278. Description of debt:	
279. Balance on account:	
280. Amount of monthly payment:	
281. Date of last payment:	
282. Have you provided us with your most current statement?	
283. Name of creditor #4:	
284. Description of debt:	
285. Balance on account:	
286. Amount of monthly payment:	
287. Date of last payment:	
288. Have you provided us with your most current statement?	
289. Name of creditor #5:	
290. Description of debt:	

291.	Balance on account:	
292.	Amount of monthly payment:	
293.	Date of last payment:	
294.	Have you provided us with your most current statement?	
295.	Name of creditor #6:	
296.	Description of debt:	
297.	Balance on account:	
298.	Amount of monthly payment:	
299.	Date of last payment:	
300.	Have you provided us with your most current statement?	
		OTHER EXPENSES
301.	How much have you paid into our or any other attorney's trust account for fees and costs so far on this case?	
302.	What was the source of that money?	
303.	How much have you actually been charged for attorney's fees and costs so far in this case?	
304.	What arrangements have you made to pay for attorney's fees and costs in your case?	
305.	Have you provided us with your last two IRS 1040 tax returns, with all attached schedules and W-2s, and also your last six months of pay stubs from your employment (s)?	If not, why not?
306.	Do you or your spouse have any lawsuits or potential lawsuits in which either of you are or might be defendants?	
307.	If so, please specify these claims and the circumstances during which they arose.	

QUESTIONS ABOUT YOUR SPOUSE		
308.	Your spouse's occupation:	
309.	The highest year of education completed:	
310.	If your spouse completed one or more college degrees, name the college, field of study, and year spouse graduated for each.	
311.	Were you married at the time your spouse studied and completed his or her education?	
312.	If so, what was the source of funds by which your spouse's educational expenses were paid?	
313.	How did you pay your spouse's monthly bills during your spouse's education?	
314.	Does your spouse have any special vocational skills?	
315.	What is your spouse's present gross monthly income?	
316.	Does your spouse suffer mental illness?	
317.	Does your spouse have any serious physical disabilities?	
318.	Does your spouse take any medications? If so, please list them.	
319.	Is your spouse beneficiary of any trust?	
320.	Have you and your spouse signed a community property agreement?	
321.	If so, when, where, and who drafted it?	Please supply a copy of this instrument.
322.	Do you and your spouse have a premarital or post-marital agreement?	
323.	If so, when, where, and who drafted it?	
OUR REPRESENTATION OF YOU		
324.	How did you learn of Lancaster Law Office?	
325.	Names of Prior Attorneys	

(if any):	
326. Why did you terminate your prior attorney(s)?	
327. Do you owe any money to any attorney who represented you in this matter?	
328. What is the source of funds you are using to pay our fees and costs in your matter?	
329. Have you or your spouse ever filed for dissolution of your marriage before?	
330. If so, in what state and county?	
331. In what month and year?	Please provide all papers you have related to this filing.
332. Do you have any questions concerning the representation agreement with our office?	
333. Are you tired of answering questions?	
*** If you have minor children of the marriage, you and your spouse must attend a Parenting Seminar before your dissolution, custody or paternity matter can be finalized.	We will provide you with information about parenting seminars. Please register for the seminar as soon as possible. If you are filing for divorce in Snohomish County, please provide us with the original of your certificate of completion so that we can file it with the court. If you are filing for divorce in King County, the seminar instructors file the original of the certificate. Please provide us with a copy.