



PRENUPTIAL AGREEMENT INTAKE FORM

PLANNING FOR LOVE, LIFE, AND LEGACY—TOGETHER!

This Prenuptial Intake Form is designed to help us understand your vision, goals, and the structure that best supports your new venture. To ensure a meaningful and productive consultation, please complete and submit this form at least **72 hours** prior to your scheduled appointment. This gives us time to carefully review your information and come prepared to offer the insight and guidance your business deserves.

Don't stress about having every document or answer upfront. Share what you can now, and we'll guide you through the rest with care and clarity. Your future together deserves protection—let's turn your shared vision into lasting security!

DISCLAIMER: Your privacy matters. Everything you share here is kept strictly confidential and used only to prepare for your consultation. Just a heads-up: completing this form doesn't establish an attorney-client relationship. Our initial meeting is simply a starting point for us to explore your needs—no pressure, no obligations until we both agree to move forward. **A formal agreement must be signed in order to become an OFFICIAL FOREVER LEGAL CLIENT.**

Today's Date: _____

How did you hear about FOREVER LEGAL? _____

MARRIAGE/PRE-NUPTIAL AGREEMENT

What is the expected date of marriage? _____

Where will the marriage take place? _____

Have the wedding invitations been sent out? ☐ Yes ☐ No

What other plans have been made and/or carried out for the wedding?



Do you feel pressured in any way to enter into a prenuptial agreement?

☐ Yes

☐ No

The Prenuptial Agreement is desired by: _____

Your **main goals** for the prenuptial agreement are as follows: (to separate inheritance or gifts; to address assets in the event of divorce; to address assets in the event of death; to provide spousal support, etc).

How do **your goals** differ from your fiancé's goals:

What issues do you foresee with the negotiation of the prenuptial agreement?

Does your fiancé have an attorney? ☐ Yes ☐ No

If yes:

Attorney's contact information:



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PERSONAL CONFIDENTIAL INFORMATION

What is your full name? *[First Name, Middle, Last Name]*

List any other former names: _____

What is your driver's license number? _____

Are you a U.S. citizen? ☐ Yes ☐ No

What is your date of birth? _____

What is your social security number? *[Optional]* _____

What is your address? *[Street Address or PO Box, City, State, Zip]*

What is your county of residence? _____

What is your email address? _____

What is your phone number? _____

What is your preferred method of contact? _____

Have you had any previous marriages? ☐ Yes ☐ No

If yes, list terminating event(s) and date(s):

Are you currently employed? ☐ Yes ☐ No

If Yes:

Occupation/Position: _____

Employer Name, Address, and Contact Information:

Estimated Annual Income from Salary, Bonuses, etc.: _____



FUTURE SPOUSE

What is their full name? *[First Name, Middle, Last Name]*

List any other former names: _____

What is their driver's license number? _____

Are they a U.S. citizen? ☐ Yes ☐ No

What is their date of birth? _____

What is their social security number? *[Optional]* _____

What is their address? *[Street Address or PO Box, City, State, Zip]*

What is their county of residence? _____

What is their email address? _____

What is their phone number? _____

What is their preferred method of contact? _____

Have they had any previous marriages? ☐ Yes ☐ No

If yes, list terminating event(s) and date(s):

Are they currently employed? ☐ Yes ☐ No

If Yes:

Occupation/Position: _____

Employer Name, Address, and Contact Information:

Estimated Annual Income from Salary, Bonuses, etc.: _____



CHILDREN (IF APPLICABLE)

Full Legal Name	DOB	SSN	Where does the child reside?	Other Parent

Provide any additional information below:

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SOURCES OF INCOME

Each person must make a full and complete financial disclosure to the other. The information contained in this form will be disclosed to the other spouse. If there are any assets not specifically identified in this form, please include those assets at the end.

<u>Source</u>	<u>Type*</u>	<u>Expected this Calendar Year</u>	<u>Amount Last Calendar Year</u>	<u>Amount 2 Calendar Years Ago</u>	<u>Significant Changes Expected</u>

* S = Salary
P= Pension
D= Dividends
I= Interest
C= Capital
Gains T-Trust
R=Rent
O=Other



ASSETS

A. Real Property

<u>Type*</u>	<u>Address</u>	<u>Purchase Date</u>	<u>Purchase Price</u>	<u>FMV</u>	<u>Balance on Mortgage</u>	<u>Title Owner(s)</u>

* R = residence, I= investment/ rental, U = unimproved land, F= farm or ranch, C= commercial property, V = vacation property

B. Cash Accounts

<u>Type</u>	<u>Bank</u>	<u>Account No. (Last 4 Digits)</u>	<u>Approximate Value (date)</u>	<u>Title Owner(s)</u>



C. Retirement Accounts, Stocks, Bonds, Annuities & Other Accounts

Type	Financial Institution	Account No. (Last 4 Digits)	Approximate Value (date)	Title Owner(s)

D. Notes/Accounts Receivable

Owed By	Account No.	Amount Due	Due Date	Purpose

E. Life Insurance

Type	Insurer	Title Owner	Face Value	Beneficiaries



G. Other Property

Description	Title Owner(s)	FMV

H. Pets & Other Animals

Name	Type of Animal	Title Owner

A list of livestock and horses should be provided under separate cover, if applicable.

II. LIABILITIES/DEBTS

Type of Debt	Financial Institution	Account No. (Last 4 Digits)	Approximate Liability (Date)	Debtors/ Title Owner



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Are you currently the beneficiary of a trust held by another? ☐ Yes ☐ No

If yes, please provide the name of the trust(s):

Do you wish to intend by the agreement that no community property will be created during the marriage? ☐ Yes ☐ No

If other, please specify:

What do you want to happen to your property in the event of divorce (i.e., keep my own, spousal maintenance, cash, etc.)?

What property do you want your prospective spouse to have in the event of divorce (i.e., keep their own, spousal maintenance, cash, etc.)?

What should happen to your property in the event of your death?

What should happen to your prospective spouse's property in the event of their death?

How do you intend to file tax returns? ☐ Joint ☐ Separate

Do you want to be liable for your prospective spouse's debt he/she acquired before or during marriage? ☐ Yes ☐ No ☐ Other

If other, briefly explain what you want:

Do you plan on opening or already have any joint accounts? ☐ Yes ☐ No



If yes, please list the types of joint accounts you anticipate opening or already have:

If joint accounts are created, how should they be divided in the event of divorce?

- ☐ Divided Equally as Separate Property
- ☐ Divided proportionally to funds each person contributed to the account
- ☐ Other

Do you wish to allow gifts to each other during the marriage? ☐ Yes ☐ No

Do you want to include a requirement that one spouse provide the other with life insurance? ☐ Yes ☐ No

If yes, please specify which spouse will pay the life insurance premiums:

Do you have a specific dollar amount of the life insurance that must remain in force?

- ☐ Yes ☐ No

If yes, please specify:

Do you have a number of years the life insurance must remain in force?

- ☐ Yes ☐ No

If yes, please specify:

Do you want to permit the spouse who is obligated to provide the other with life insurance to substitute a bequest of cash in his/her will or revocable trust in place of all or part of the life insurance? ☐ Yes ☐ No

Upon your death, should your prospective spouse be allowed to live in your separate property home? ☐ Yes ☐ No

Upon your prospective spouse's death, should you be allowed to live in his/her separate property home? ☐ Yes ☐ No

Do you wish to include provisions to address deviations from the general terms in the



event that one spouse is 100% disabled or terminally ill at the time of divorce?

☐ Yes ☐ No

Do you wish to include language addressing attorney's fees in the event of divorce?

☐ Yes ☐ No

If yes, please detail the type of language you wish to include (e.g., each responsible for their own fees, prevailing party entitled to fees, etc.):

Should the agreement terminate after a set number of years? ☐ Yes ☐ No

If yes, please specify:

Should the level or amount of compensation change based on years married?

☐ Yes ☐ No

If yes, please specify:

ADDITIONAL INFORMATION

Are there any potential issues or additional information you would like FOREVER LEGAL to know in advance of our consultation?

Are there any specific questions you have that should be addressed in our consultation?



CERTIFICATION

I hereby affirm that the information contained in this questionnaire is complete and accurate to the best of my/our knowledge.

Signature

Date

**DO NOT EMAIL THIS INTAKE FORM.
TO ENSURE YOUR INFORMATION
REMAINS SECURE UPLOAD YOUR
FORM IN MYCASE. THANK YOU!**