

**Marital Standard of Living  
Interview Questionnaire**

Client Name: \_\_\_\_\_

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

Prepared By: \_\_\_\_\_

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**Banking Information**

- List all bank accounts that you are aware of for the past several years.

Institution	Account #	Primary User	Purpose

- Have you changed banking institutions in the past three years?

Yes	No	Notes

- Are you aware of any safe deposit boxes? What is in them? (Cash, jewelry, etc)

Yes	No	Notes

**Investment Account Information**

- List all investment accounts that you are aware of for the past several years.

Institution	Account#	Primary User	Purpose

- Do you have a rewards program with any credit cards? Describe.

Yes	No	Notes

- Have you used these rewards in the past? Describe

Yes	No	Notes

### Manner of Paying Expenses/General

How are household bills paid? Who pays and what source?	
Describe the payment of expenses on behalf of your children.	
Have your living conditions changed materially in the last three years of marriage?	

- Do you have a safe? Yes\_\_\_\_\_ No\_\_\_\_\_

### Current Needs

Have your living conditions changed since separation?	
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Identify all activities that you customarily engaged in that you are currently unable to engage in due to cash flow restrictions.	
Describe any plans you have to attend school or retain to enter the workforce?	
Describe any debt you have accumulated since the date of separation.	

**Extraordinary/Deferred Expenses**

Describe any large or unusual expenditure that has occurred during the last three years.	
Are you aware of any other forthcoming obligations which have not been paid in the last 12 months?	

**Expenditures paid by Business/Other Sources on Behalf of Parties**

Do you enjoy the use of any property that is owned and paid off (e.g. timeshare)?	
Do you use credit card rewards for airline, hotel, or other vacations/items?	
Do you use credit card rewards for personal expenses and vice versa?	
Do you attend business functions? Describe	

Are you aware of any expenses that are paid for by the business?	
Are you aware of any expenses that are paid for by any other source (e.g. family)?	
Do you pay any business expenses from your personal accounts?	

- Does your business or that of your spouse pay for any personal expense?  
(check all that apply)

Vehicles		Internet		Health Ins.	
Landscaping		Travel		Life Ins.	
Household Supplies		Entertainment		Disability Ins.	
Utilities		Meals		Auto Ins.	
Telephone		Country Clubs		Umbrella Ins.	
Cell Phones		401(k) Contributions			

## Pets

Do you have any pets?	
How often do you take them to be groomed?	
How often do you board them?	
How often do you take them to the veterinarian?	
Do they take medication?	
Do you have health insurance for them?	

Describe the family interaction with various pets.	
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### **Taxes**

Are you aware of any refunds owed?	
Are you aware of any outstanding liabilities?	
Do you know if you typically make estimated payments?	
Have you ever been audited?	

### **Documents Needed**

- Credit card statements for the last twelve months (12) indicating the category of each charge with an explanation (only need to explain vendors once, explain extraordinary costs).
- Checking account records with copies of scanned checks.
- Information and explanation of health benefits.
- Insurance policies - what/who is insured, how much, etc.
- Most recent tax return