



GRAY DIVORCE FINANCIAL PLANNING

Leave and Don't Lose Your Assets

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LawsonFinancialGroup.com

Blog: *The Gray Girlfriends' Guide to Divorce*

Client Intake Form

Name: _____ Date of Birth: _____

Address: _____

City/State/Zip: _____

Phone: preferred contact number Home Work Cell

Home: _____ Work: _____ Cell: _____

Email: _____

Spouse's Email: _____

CHILDREN

Currently Lives With:

Name	Date of Birth	Mother	Father	Both	Partner	Other
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CURRENT MARITAL CIRCUMSTANCES

Years Married _____

Date of Marriage: _____

Currently Separated? Yes No

Date of Separation: _____

Who Filed? _____

Date of Filing: _____

Attorney Engaged? Yes No

Attorney's Name: _____
Phone: _____
Email: _____

Other Professional(s) (CPA, Therapist, Etc) - *pleasure use a separate sheet if needed*

Name: _____ Profession: _____
Phone: _____
Email: _____

Please initial here to give permission to speak with these professionals: _____

Was the separation or divorce expected?

- Yes, for a long time
- Yes, but only recently
- No, unexpected

Do you want this divorce?

- Not at all
- I have mixed feelings
- No, but I am resigned to it
- I feel it is for the best

Previously married? Yes No

If yes, date of marriage: _____

Date of divorce: _____

Factors Contributing to Marital Problems (check all that apply):

- | | |
|---|--|
| <input type="checkbox"/> Recently had difficulty communicating | <input type="checkbox"/> Difference in interests |
| <input type="checkbox"/> Always had difficulty communicating | <input type="checkbox"/> Difference in education level |
| <input type="checkbox"/> Difference in ethnic or racial background | <input type="checkbox"/> Differences in expectation about marriage |
| <input type="checkbox"/> Difference in expectations about family life | <input type="checkbox"/> Changes in lifestyles, values |
| <input type="checkbox"/> Outside relationships or interest | <input type="checkbox"/> ADD/ADHD |
| <input type="checkbox"/> Job commitment | <input type="checkbox"/> Untreated medical issues/conditions |
| <input type="checkbox"/> School Commitment | <input type="checkbox"/> Medical issues/conditions |

Other (please explain): _____

Major Financial Events and/or Financial Changes Within The Last 12 Months:

- Started school/training program
- Graduated from school/training
- Entered job market
- Lost job
- Changed jobs
- Job security has changed
- Started a business
- Pension Plan Changes (current status, insolvent, frozen etc.). Please explain: _____
- Lost a business
- Legal problems
- Outstanding debt
- Foreclosure
- Credit Problems
- Establishing credit
- Bankruptcy
- Interest rate changes
- Untaken major new expense
- Changes in child care
- Child education expenses
- Moved residence
- Increase in financial responsibility
- Death of significant friend/family

Other (please explain): _____

Financial Management

Who manages the checkbook? _____ Who applies for credit? _____

Who pays the bills? _____

Which methods have you used to manage financial decisions during your marriage?

- Negotiating
- Dictating
- Problem Solving
- Avoiding
- Accomodating
- Clear roles defined
- Arguing, one wins
- Arguing, resolution
- Arguing, no resolution

Who is the saver? _____

Strategies for Saving Money (check all that apply):

- 401(k)
- IRAs
- Savings Accounts
- Coupons
- Online Banking
- Rainy Day Fund
- 501c3
- Limited Partnerships
- LLCs
- C-Corporation
- S-Corp
- Offshore Accounts
- Worries
- Stockpiling
- Delayed Gratification
- Separate Accounts
- Separate Credit Cards
- Do Without
- Savings based on the future
- Written Budget
- Health Savings Account
- Partnerships

Who is the Spender? _____

Strategies for Spending Money (check all that apply):

- "It was on sale"
- Separate credit cards
- Spending determines the budget

- Impulse Buying
- Retirement accounts
- Stocks, Bond
- Spending based on anticipated future income (*raises, bonuses, lottery winnings, selling rental property, etc.*)
- Spending based on future worries
- Separate bank accounts
- Coupons
- Arbitrary Spending
- Budget determines spending
- Rigid Financial Management

Personal Career & Financial History

Position: _____ Length of Employment: _____

Annual Income: _____ Percentage of Total Income: _____

Other paid/non-paid work and employment length: _____

Homemaker For how long: _____

Positions held prior to being a homemaker: _____

How long: _____ Paid/non-paid: _____

My biggest financial concern is: _____

It's important financially to me that: _____

My biggest financial concern for my spouse is: _____

I worry financially my spouse will: _____

(Regardless of age) My biggest concern for our children is: _____