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CONFIDENTIAL DISSOLUTION INFORMATION SHEET

Please complete the following information as completely as you can so that we are able to advise you appropriately. If a question does not apply to you, just leave it blank.

	Husband	Wife
Full Name / Nickname		
Former Name(s)		
Maiden Name / Restore?		
Residence Address		
Home Telephone		
Cell Number		
Fax Number		
Email		
Social Security No.		
Driver's License No.		
Birthdate		
Birthplace		
Citizenship		
Oregon Resident?		
Number of Years?		
Race		
Education (Highest Grade Completed)		
Occupation		
Employer		
Employer Address		
Work Telephone		

Gross Monthly Income		
Military Service?		
If Yes, Branch / Rank?		

This Marriage
DATE and **PLACE** of Marriage (city, county, state):
Are you currently separated?
If yes, date last resided in the same household (day, month, year):
Do you and your spouse have a prenuptial or other formal property agreement?
No. of this Marriage?

Former Marriages

	Husband	Wife
Former Spouse's Name		
Date of Marriage		
How Marriage Ended?		
Date of Divorce/Death		
Spousal Support Paid?		
How Much?		

Children of This Marriage (including Adopted Children)

Name:	Nickname:
DOB:	Social Security No.:
Residence Address Last 5 Years:	
Person Resided With:	
Name:	Nickname:
DOB:	Social Security No.:
Residence Address Last 5 Years:	
Person Resided With:	

Name:	Nickname:
DOB:	Social Security No.:
Residence Address Last 5 Years:	
Person Resided With:	

Legal Custody to:	Mother	Father	Both
Physical Custody to:	Mother	Father	Both
Monthly Support:	Child	Spouse	
To be paid by:			
Are there any other pending proceedings regarding child custody and/or support?			
If so, where? Court:	Case No.:	County/State:	
Health Insurance Coverage:			
Unreimbursed/Uninsured Expenses paid by:			
Life Insurance Coverage:			

NON-JOINT CHILDREN

Name	Age	Person Resides with:

	HUSBAND	WIFE
Custody/Parenting Time:		
Monthly Child Support Paid?		
How Much?		

DISTRIBUTION OF PROPERTY

REAL PROPERTY

1. Residence:
   Legal description from deed, contract or mortgage:

   Awarded to:

2. Other Real Property:
   Legal description from deed, contract or mortgage:

   Awarded to:

NOTE: If you are awarded a judgment for child and/or spousal support, you may file a lien on the real property awarded to the person obligated to pay that support.

Do you want to file a lien certificate with the Court?

PERSONAL PROPERTY

Include bank and investment accounts with account numbers, business assets, household furniture and furnishings, jewelry, personal effects, tools, pets, etc.

Award to Husband:

Award to Wife:

VEHICLES		
MAKE	**YEAR**	**AWARD TO:**

RETIREMENT / BENEFIT PLANS IRA, Pension, Profit-Sharing, 401(k), Deferred Compensation, etc.		
	Husband	Wife
Plan Type (IRA, Pension, etc,)		
Designated Beneficiary		
Plan Value		
Loans Against Plan		

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Designated Beneficiary		
Plan Value		
Loans Against Plan		
Plan Type (IRA, Pension, etc,)		
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Plan Value		
Loans Against Plan		
Plan Type (IRA, Pension, etc,)		
Designated Beneficiary		
Plan Value		
Loans Against Plan		

DEBTS OWED

Name of Creditor	*Balance Due*	*Monthly Pymt*	*Husband Pay*	*Wife Pay*
ATTORNEY FEES/COSTS TO BE PAID BY:				

PROPERTY INFORMATION

Asset	Whose Name (Husband/Wife/Joint)	Market Value	Debt	Net Equity
Real Estate - Address, city and state: (Place a ✔ next to any property on which you have mortgage cancellation insurance)				

PROPERTY INFORMATION				
Asset	Whose Name (Husband/Wife/Joint)	Market Value	Debt	Net Equity
Bank Accounts - Bank and account type:				
Business Interests:				
Stocks, Bonds, Mutual Funds:				
Notes, Mortgages, Trust deeds, Contracts, etc., owed to you				
Personal Property - Furnishings, Autos, etc.				
TOTALS:				

Do either you or your spouse own real or personal property jointly with anyone besides each other? ☐ Yes ☐ No Property: Joint Owner: Property: Joint Owner: Property: Joint Owner:
Do you have a safe deposit box? ☐ Yes ☐ No Bank: Branch: Joint Owner: Bank: Branch: Joint Owner:

LIFE INSURANCE		
	Husband	Wife
Life Insurance Company		
Policy Owner		
Designated Beneficiary		
Alternate Beneficiary		
Face Value (Policy Amount)		
Accumulated Cash Value		
Loans Against Policy		

Your Advisors			
	Name	Address	Telephone
Attorney			
Accountant			
Financial Advisor			
Personal Banker			
Life Insurance Agent			
Stockbroker			
Referred to our firm by			

Please use this space or the back of this page to provide additional information about any question:

PRIVACY POLICY NOTICE

Attorneys who provide legal services involving their clients' financial matters are now required by federal law to inform those clients of their policies regarding the privacy of client information. The purpose of this notice is to explain what we will be doing with the financial information that you provide to us and how we will protect your privacy.

Oregon attorneys are bound by the Oregon Rules of Professional Conduct. The Rules of Professional Conduct govern our conduct and require us to protect your confidentiality. These professional standards are even more stringent than those now required by federal law. Therefore, we have always protected your right to privacy and will continue to do so. Federal law now also requires that we let you know how we are protecting your privacy.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

We collect nonpublic personal information about you that is provided to us by you or obtained by us in order to provide you with the legal services you have requested. In some cases, this information includes details about your personal finances and property.

DISCLOSURE OF INFORMATION

We only disclose nonpublic personal information about you to individuals or entities when it is necessary in order to provide you with the legal services that you have requested. For instance, our staff may have access to your nonpublic personal information in order for us to efficiently provide you with the legal services you have requested. In some situations we may provide information to another organization (such as your accountant, realtor, or insurance company) in order to obtain information or assist in providing the legal services you have requested.

We do not disclose nay nonpublic personal information about you to anyone, except as is necessary in order to provide you with the legal services that you have requested. The only disclosures we make are those that are permitted by law and by the Oregon Rules of Professional Conduct.

YOUR PRIVACY IS IMPORTANT TO US

We retain records and files relating to the professional services you have asked us to provide. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with the Oregon Rules of Professional Conduct which govern our profession. Please call us with any questions you have about protecting your privacy, (503) 228-8448.

CLOSING

On conclusion of this matter, we will write to you advising you that we have concluded our work. In closing your file, we will return any original copies of personal documents that you may have provided to us and archive your file.