

FOR OFFICE USE ONLY

Date of meeting	
Review/follow-up?	YES / NO
When?	
Method of contact	

CLIENT INITIAL INTERVIEW

Your Full Name :

Address :

Date of Birth :

Telephone No(s): Home:
Mobile:

Work:

Email :

Occupation :

Full Name of Other Party (i.e. spouse/civil partner/former partner) :

Are they your: Husband Wife Cohabitee Other (please circle)

What is their age and date of birth?

How did you hear about us?

How can we best help you today?

To help you get the most out of this session it would be helpful for us to know which of the following applies to your circumstances. (Please circle which of the below best applies to you)

- a) I want information and advice before I separate.
- b) I have already separated and want to know what to do next.
- c) I have received a letter from solicitors/Court documents.

GENERAL INFORMATION

Are you currently living in the same house? Yes/No (please circle)

Do you own the property? Yes/No (please circle)

When did you start your relationship?

When did you separate (if not yet separated please write N/A)?:

Do you or your spouse/civil partner/cohabitee own or have a share in a business?:

PLEASE STATE WHAT YOU WANT ADVICE ON (please circle and then complete the corresponding section below):

- a) Divorce/dissolution
- b) Money issues
- c) Children
- d) Issues with my cohabitee

A. DIVORCE/DISSOLUTION

How long have you been living together?

When did you get married/in a civil partnership?

When did you separate?

B. MONEY ISSUES

Do you own a house? If so, in whose name is it in?

How much is the house worth?

What amount is outstanding on the mortgage?

Do you have any savings? (Please estimate to the nearest £1000)

Do you have any other capital assets? (Please list and give approximate values to the nearest £1000)

What is your yearly income? Gross £

How much do you take home every month? £

Do you have a pension? If so, what is it worth? £

Do you have any debts such as loans or credit cards? If so, how much is outstanding in total?

What is your partner's income?

Do they have any other assets or debts which are not mentioned above?

Assets:

Debts:

C. CHILDREN

For each of your children please state their name, age and date of birth:

<u>Child's name</u>	<u>Age</u>	<u>Date of birth</u>

Do they live with you?

How often do they see you/spend time with their other parent?

Have you any other comments regarding your children or children arrangements?

D. IF YOU COHABIT INSTEAD OF BEING MARRIED

Whose name is the house in? (please circle) Joint Your name Their name Other

Is the mortgage the same? (please circle) YES / NO

Who paid for the deposit?

Who pays the household utilities?

Has anyone put any other money into the property since it was purchased? If so, how much and what for?

Has anyone made any other contribution such as household improvements/building an extension etc.?