



www.heritagelawtx.com

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**PRE-MARITAL/POST MARITAL AGREEMENT WORKSHEET**

PLEASE PROVIDE THE FOLLOWING INFORMATION:

**General Information**

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

**To complete this questionnaire, one spouse should be designated as CLIENT, the other as SPOUSE– Please answer each section as it pertains to the INDIVIDUAL, not as a couple.**

**INFORMATION ABOUT CLIENT**

Full Legal Name: \_\_\_\_\_

Name As You Sign on Documents: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ County of Home: \_\_\_\_\_

Place of Employment: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Sex: M F

Marital Status: \_\_\_\_\_ U.S. Citizen? Y N

Is this your first marriage? Y N

Children w/ Current/  
Proposed Spouse:

Name	Date of Birth
_____	_____
_____	_____

Your Children from prior marriages:

_____	_____
_____	_____
_____	_____
_____	_____

Deceased Children:

_____	Descendants? Y	N
_____	Descendants? Y	N
_____	Descendants? Y	N

**INFORMATION ABOUT SPOUSE/ PROPOSED SPOUSE**

Full Legal Name: \_\_\_\_\_

Name As You Sign on Documents: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ County of Home: \_\_\_\_\_

Place of Employment: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email Address: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Sex: M F

Marital Status: \_\_\_\_\_ U.S. Citizen? Y N

Is this your first marriage? Y N

Children w/ Current

Proposed Spouse:	Name	Date of Birth
	_____	_____
	_____	_____

Your Children from prior marriages:

_____	_____
_____	_____
_____	_____
_____	_____

Deceased Children:

_____	Descendants? Y	N
_____	Descendants? Y	N
_____	Descendants? Y	N

**GENERAL INFORMATION ABOUT COUPLE:**

How Were You Referred to Heritage Law ? : \_\_\_\_\_

Who Will Be Responsible for Your Account With Us?: \_\_\_\_\_

Have you seen another attorney about this matter? \_\_\_\_\_ If yes, who? \_\_\_\_\_

**OTHER CONCERNS OR COMMENTS WHICH YOU FEEL WILL BE HELPFUL IN AIDING THE ATTORNEY IN YOUR PREMARITAL/ POST MARITAL AGREEMENT:**

**WHAT ARE YOUR GOALS YOU WOULD LIKE TO SEE ACCOMPLISHED IN YOUR PRE-MARITAL / POST-MARITAL AGREEMENT:**