

**CONFIDENTIAL DOMESTIC QUESTIONNAIRE**  
**The Williams Law Group, P.C.**  
**115 Parkway Office Court, Suite 200**  
**Cary, NC 27518**

**A: CLIENT – SPOUSE/OPOSING PARTY PERSONAL DATA:**

**1. CLIENT PERSONAL DATA – FULL LEGAL NAME**

Name: \_\_\_\_\_  
First Middle Last (Jr.)

dob: \_\_\_\_\_ ssn: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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

County: \_\_\_\_\_

**\*\*\*\*It is client's responsibility to keep the office informed of current address and phone numbers\*\*\*\***

I am presently still residing with the spouse or opposing party please direct all correspondence to the following address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Home phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Date of Separation: \_\_\_\_\_(DOS)

Place of Marriage: \_\_\_\_\_ (city, county, state)

If never married provide the relevant dates of your relationship and specify dates in which you lived together (if any) please be clear and specific :

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My maiden name is \_\_\_\_\_ (please print)

Do you wish to resume the use of your maiden name : \_\_\_\_ yes \_\_\_\_no

Education (check all that apply)

- high school
- college
  - degree earned \_\_\_\_\_
  - college attended \_\_\_\_\_
  - date of graduation \_\_\_\_\_
- graduate school
  - degree earned \_\_\_\_\_
  - college attended \_\_\_\_\_
  - date of graduation \_\_\_\_\_

Children by prior marriage (include age): \_\_\_\_\_

Are you receiving child support: \_\_\_\_

Are you paying child support: \_\_\_\_

Amount: \$ \_\_\_\_\_

Current Employer: \_\_\_\_\_ Position: \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Phone number: \_\_\_\_\_

I have been employed with this employer since: \_\_\_\_/\_\_\_\_/\_\_\_\_

**(ATTACH A COPY OF LAST TWO PAYCHECK STUBS AND W-2)**

Previous employers: provide the name, dates of employment, and salary of the two employers immediately preceding your current employer.

(1)

(2)

**2. SPOUSE/OPPOSING PARTY PERSONAL DATA – FULL LEGAL NAME**

Name: \_\_\_\_\_  
                    First                                    Middle                                    Last                                    (Jr.)

dob: \_\_\_\_\_ ssn: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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

County: \_\_\_\_\_

Home phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Pager no.: \_\_\_\_\_

Email: \_\_\_\_\_

Education (check all that apply)

- high school
  
- college
  - degree earned \_\_\_\_\_
  - college attended \_\_\_\_\_
  - date of graduation \_\_\_\_\_
  
- graduate school
  - degree earned \_\_\_\_\_

-college attended \_\_\_\_\_  
-date of graduation \_\_\_\_\_

Current Employer: \_\_\_\_\_ Position: \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Phone number: \_\_\_\_\_

They have been employed with this employer since: \_\_\_/\_\_\_/\_\_\_

**(ATTACH A COPY OF LAST TWO PAYCHECK STUBS AND W-2)**

Previous Employers: provide the names, dates of employment and salary of the opposing parties two employers immediately preceding his/her current employer.

(1)

(2)

**3. CHILDREN BORN OF THE MARRIAGE/RELATIONSHIP:**

<u>Full Legal Name</u>	<u>DOB/Age</u>	<u>current address</u>	<u>Birth Place(county/state)</u>
(first, middle & last)			

a.

b.

c.

d.

e.

**3(a).** Please summarize any understanding that you and the opposing party have in regards to custody and visitation. If there is no agreement, please summarize your preference for custody and visitation, including summer and holiday schedules. If necessary, attach an additional page for the summary.

**3(b).** Please summarize any understanding that you and the opposing party have in regards to child support. If there is no agreement, please summarize your preference including amount of monthly obligation and method of payment.

**4. REAL PROPERTY**

Address of marital residence: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

County: \_\_\_\_\_

How is the property titled: \_\_\_\_\_

When was it purchased: \_\_\_\_\_ (mm/yr)

Method of payment: \_\_\_\_\_

What is the current market value: \$ \_\_\_\_\_

The property was last appraised on \_\_\_\_/\_\_\_\_/\_\_\_\_ (attach a copy of the appraisal)

List any outstanding mortgages or loans on the property:

lender	date of loan	amount owed (DOS)	Account no.
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a.

b.

Address of other real property: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

County: \_\_\_\_\_

How is the property titled: \_\_\_\_\_

When was it purchased: \_\_\_\_\_ (mm/yr)

Method of payment: \_\_\_\_\_

List any outstanding mortgages, equity lines or other loans on the property:

lender	date of loan	amount owed (DOS)	Account no.
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a.

b.

Current market value of property: \$ \_\_\_\_\_

The property was last appraised \_\_\_\_/\_\_\_\_/\_\_\_\_ (attach a copy of appraisal)

**4(a).** Please summarize any understanding you and the opposing party have in regards to who will retain the listed property. If there is no agreement, please summarize your preference. If necessary, attach an additional page for the summary.

**5. BANK ACCOUNTS:**

Cash on hand: \$\_\_\_\_\_

Type of Account: \_\_\_\_\_  
Bank: \_\_\_\_\_  
Name(s) on account \_\_\_\_\_  
DOS balance \_\_\_\_\_  
Current balance \_\_\_\_\_  
Has account been closed: \_\_\_\_\_

Type of Account: \_\_\_\_\_  
Bank: \_\_\_\_\_  
Name(s) on account \_\_\_\_\_  
DOS balance \_\_\_\_\_  
Current balance \_\_\_\_\_  
Has account been closed: \_\_\_\_\_

Type of Account: \_\_\_\_\_  
Bank: \_\_\_\_\_  
Name(s) on account \_\_\_\_\_  
DOS balance \_\_\_\_\_  
Current balance \_\_\_\_\_  
Has account been closed: \_\_\_\_\_

Type of Account: \_\_\_\_\_  
Bank: \_\_\_\_\_  
Name(s) on account \_\_\_\_\_  
DOS balance \_\_\_\_\_

Current balance \_\_\_\_\_  
Has account been closed:\_\_\_\_\_

**5(a).** Please summarize any understanding you and the opposing party have in regards to the division and/or distribution of bank account proceeds. If there is no agreement, please summarize your preference for division and/or distribution. If necessary, attach an additional page for the summary.

**6. STOCKS/BONDS:**

<u>Name of company</u>	<u># of shares</u>	<u>date acquired</u>	<u>current value</u>
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- a.
- b.
- c.
- d.
- e.
- f.

**6(a).** Please summarize any understanding you and the opposing party have in regards to the division and/or distribution of listed stocks/bonds. If there is no agreement, please summarize your preference for division and/or distribution. If necessary, attach an additional page for the summary.



**7. AUTOMOBILES:**

Year/Make/model	name on title	book value	amount owed	monthly payment
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- a.
- b.
- c.
- d.

**7(a).** Please summarize any understanding you and the opposing party have in regards to who will retain the listed automobiles. If there is no agreement, please summarize your preference. If necessary, attach an additional page for the summary.

**8. RETIREMENT ACCOUNTS (IRA, 401K, pension):**

Client accounts:

Company	type of account	dates of employment	value of plan
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- a.
- b.
- c.
- d.

Spouse/opposing party accounts:

Company	type of account	date of employment	value of plan
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a.

b.

c.

d.

**8(a).** Please summarize any understanding you and the opposing party have in regards to the division and/or distribution of the listed pension accounts. If there is no agreement, please summarize your preference. If necessary, attach a additional sheet for the summary.

## 9. LIFE INSURANCE

Company name	Policy Owner	Cash Value	Beneficiary	Insured
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a.

b.

c.

d.

e.

**9(a).** Please summarize any understanding you and the opposing party have in regards to who will retain ownership of listed policies. If there is no agreement, please summarize your preference. If necessary, attach an additional sheet for the summary.

**10. HEALTH INSURANCE:  
( you may need to consult your company benefits package in order  
to provide the most accurate answers)**

(a.) Are you presently covered under a health insurance plan:\_\_\_\_\_

Name of insurer: \_\_\_\_\_

Who is responsible for paying for the insurance:\_\_\_\_\_

What is the cost of the insurance: \$\_\_\_\_\_ (please indicate only the cost for your portion of the insurance)

(b.)

Is the opposing party presently covered under a health insurance plan?:  
\_\_\_\_\_

Name of insurer: \_\_\_\_\_

Who is responsible for paying for the insurance:\_\_\_\_\_

What is the cost of the insurance: \$\_\_\_\_\_ (please indicate only the cost for their portion of the insurance)

(c.)

Are your children (at issue in this matter) presently covered under a health insurance plan:\_\_\_\_\_

Name of insurer: \_\_\_\_\_

Who is responsible for paying for the insurance:\_\_\_\_\_

What is the cost of the insurance: \$\_\_\_\_\_ (please indicate only the cost for the children's portion of the insurance)

**10(d).** Please summarize any understanding that you and the opposing party have in regards to how coverage will be maintained before and after separation and divorce or who will maintain coverage for the child(ren). If there is no understanding, please summarize your preference. If necessary, attach an additional sheet for the summary.

**11. SPOUSAL SUPPORT:** Do you anticipate that spousal support in the form of alimony will be an issue? Please indicate any understanding that you and the opposing party have in this regard. If there is no understanding, please summarize your preference including amount of alimony and length of time to be paid.

**12. DEBTS:** Please list all outstanding debts that have not been previously provided. The list should include account number, lien holder (if any), item securing the debt (if any) and an indication of the name(s) obligated to repay the debt. Provide a summary of any understanding that you and the opposing party have in regards to payment of the listed debts. If there is no understanding, please summarize your preference. Attach a separate sheet if necessary.

<u>Debt</u>	<u>Account #</u>	<u>Lien Holder</u>	<u>Security</u>	<u>Name on Debt</u>
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a.

b.

c.

d.

e.

**13. HOUSEHOLD FURNISHINGS:** Please summarize any understanding that you and the opposing party have in regards to how the household furnishings will be divided. If no agreement has been made, please list all household furnishings and the current location of the items you would like to retain. If necessary, attach an additional sheet for this list.

**14. INCOME TAXES:**

Have you and opposing party filed taxes for the last tax year? \_\_\_\_\_

If yes, how did you file? \_\_\_\_\_

If no, do you and the opposing party have an agreement as to how you will file for the last tax year? \_\_\_\_\_

What is this agreement? \_\_\_\_\_

Do you and the opposing party have an agreement regarding how any tax refunds will be distributed if you file jointly? \_\_\_\_\_

What is this agreement? \_\_\_\_\_

Do you and the opposing party have an agreement as to how you will pay the tax liability, if any? \_\_\_\_\_

What is this agreement? \_\_\_\_\_

Do you and the opposing party have any past due tax debts? \_\_\_\_\_

If yes, what is it agreement as to how any existing tax debt is to be paid:

\_\_\_\_\_

If you do not have an agreement regarding any of these tax issues, please summarize your preference.

**14. (a)**

Have you and opposing party filed taxes for the current tax year? \_\_\_\_\_

If yes, how did you file? \_\_\_\_\_

If no, do you and the opposing party have an agreement as to how you will file for the current tax year? \_\_\_\_\_

What is this agreement? \_\_\_\_\_

Do you and the opposing party have an agreement regarding how any tax refunds will be distributed if you file jointly? \_\_\_\_\_

What is this agreement? \_\_\_\_\_

Do you and the opposing party have an agreement as to how you will pay the tax liability, if any? \_\_\_\_\_

What is this agreement? \_\_\_\_\_

Do you and the opposing party have any past due tax debts? \_\_\_\_\_

If yes, what is it agreement as to how any existing tax debt is to be paid:

\_\_\_\_\_

**14.(a.)** If you do not have an agreement regarding any of these tax issues, please summarize your preference.

**15. CLIENT STATEMENT:** Please summarize any other understandings, details or concerns that you have in regards to your case. If necessary, attach an additional sheet for the summary.