

Client Name: _____

Attorney/Client-Privileged Information

1. Real Estate

1.1 Home Owned:

Street address: _____

County of location: _____

Description of improvements, if any: _____

Legal description: _____

Current fair market value: \$_____ as of _____

Exact name of mortgage company and account number, if any: _____

Current balance of mortgages: \$_____

a. Purchase mortgage

Name of lien holder: _____

Current balance of lien: \$_____ as of _____

Monthly payment: \$_____ Due date:_____ Int. rate:_____

b. Second lien (pools, ect.)

Name of second lien holder: _____

Current balance of second lien: \$_____ as of _____

Monthly payment: \$_____ Due date:_____ Int. rate:_____

c. Third lien (decrees)

Name of third lien holder: _____

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Current balance of third lien: \$_____ as of _____

Monthly payment: \$_____ Due date:_____ Int. rate:_____

Current net equity in property: _____

Date property was acquired: _____

Down payment and source of down payment: _____

Exact name on title: _____

Who lives in the house now? _____

Who wishes to live in the house after the divorce? _____

Comments: _____

1.2 Home Not Owned:

Address of dwelling: _____

General description of dwelling: _____

Furnished? _____

When did you move in? _____

Who owns the property? _____

Address: _____

Phone: _____

Rent amount: _____ Due date: _____

Are utilities included? _____ Is rent current now? _____

How long is the term of lease? _____

Written lease signed? _____

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Did you put up a deposit? _____ How much? \$ _____

How much notice to terminate lease? _____

1.3 Other Real Estate:

General description: _____

Location: _____

Legal description: _____

Other owners: _____

Date acquired: _____ Total cost: \$ _____

Record title owner: _____

Down payment and source of down payment: _____

First lien holder: _____

Address: _____

Amount of payment: \$ _____ Due date: _____ Int. rate _____

Balance due: \$ _____ as of _____