

FINANCIAL PROCESS QUESTIONNAIRE

Name: _____ Date of Birth: _____

Address: _____

City/Zip: _____

Phone: preferred contact number: Home Work Cell

(Home) _____ (Work) _____ (Cell) _____

You Email: _____

Spouse Email: _____

Child's Name	Date of Birth	Currently lives with				
		Mother	Father	Both	Partner	Other
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Current Marital Circumstances

Years Married: _____ Date of Marriage: _____

Currently Separated? Yes No Date of Separation: _____

Filed for Divorce? Yes No Date of Filing: _____

Who Filed? _____ Attorney's Engaged? Yes No

Attorney's Name: _____ Phone: _____

Email: _____

Other Professional (CPA, Therapist, etc.) Name: _____

Phone: _____ Email: _____

Please initial here to give permission to speak with these professionals:



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Was the separation or divorce expected?

- Yes, for a long time
- Yes, but only recently
- No, unexpected

Do you want this divorce?

- Not at all
- I have mixed feelings
- No, but I am resigned to it
- I feel it is for the best

Previously Married? Yes No

If 'yes': Date of Marriage: _____

Date of Divorce: _____

Factors Contributing to Marital Problems (check all that apply)

- Recently had difficulty communicating
- Always had difficulty communicating
- Difference in interests
- Differences in education level
- Difference in ethnic or racial background
- Difference in expectations about marriage
- Difference in expectations about family life
- Changes in lifestyles, values
- Outside relationships or interests
- ADD/ADHD
- Job commitment
- School commitment

Other (please explain): _____

Major Financial Events and/or Financial Changes Occurring Within the last 12 months:

- Started school/training program
- Graduated from school/training program
- Entered job market
- Changed jobs
- Lost job
- Moved residence
- Job security
- Increase in financial responsibility
- Legal problems
- Establishing credit
- Outstanding debt
- Credit problems
- Foreclosure
- Children's special needs expenses
- Child educational expenses
- Changes in childcare



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- Undertaken major new expense
- Death of parent/step parent
- Death of significant friend/family
- Bankruptcy (self, former spouse, other)
- Child/Spousal support changes
- Interest rate changes
- Pension Plan Changes (current status insolvent, frozen, etc.) Please explain:

- Other (explain):

Financial Management

Who manages the checkbook? _____ Who applies for credit? _____

Who pays the bills? _____

What methods have you used to manage financial decisions during your marriage?

- Negotiating
- Avoiding
- Arguing, one wins
- Dictate
- Accommodating
- Arguing, resolution
- Problem Solving
- Clear roles defined
- Arguing, no resolution

Who is the Saver?

Strategies for Saving Money (check all that apply):

- 401(K)
- LLC's
- Separate Accounts
- IRA's
- C-Corporation
- Separate Credit Cards
- Savings accounts
- S Corp
- Do without
- Coupons
- Off-shore accounts
- Savings based on future
- Online banking
- Swiss bank account
- Worries
- Budget spreadsheet
- Rainy day fund
- Stockpiling
- Health savings acct
- 501 (C)(3)
- Delayed gratification
- Partnerships
- LP's



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Who is the Spender?

Strategies for spending money:

- "It was on sale" Separate Credit Cards Arbitrary spending
- Impulse purchasing Coupons Spend w/in a budget
- Retirement plans Determine budget based on spending
- Stock, Bonds Rigid financial management Separate Accounts
- Spending based on future income (raise, bonus, winning lottery, selling rental property etc)
- Spending based on future worries

Personal Career Financial History

Position: _____ Employment Length: _____

Annual Income: _____ Percentage of household income: _____

Other paid/non-paid work and employment length: _____

Homemaker For how long: _____

What positions did you hold prior to being a homemaker? _____

How long? _____ Paid/non-paid: _____

My biggest financial concern is:

It's important financially to me that:



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My biggest financial concern for my spouse is:

I worry financially my spouse will:

(Regardless of age) My biggest financial concern for our child(ren) is:

