

**WEIFFENBACH & KAKLIS CLIENT INTAKE FORM**

PLEASE INDICATE THE REASON YOU ARE CONSULTING OUR FIRM:

- \_\_\_ Dissolution of Marriage (divorce) involving children;
- \_\_\_ Dissolution of Marriage (divorce) without children;
- \_\_\_ Paternity, Custody, Visitation &/or Support of children not born of marriage;
- \_\_\_ Modification of Custody, Support &/or Contact of children \_\_ with or \_\_ without a marriage;
- \_\_\_ Injunction for Protection Against Domestic Violence Injunction;
- \_\_\_ Modification of Domestic Violence Order;
- \_\_\_ Other. Please describe: \_\_\_\_\_

1. Please provide the following information about yourself:

- a. Full Name \_\_\_\_\_
- b. Highest degree of education \_\_\_\_\_  
Portion completed before marriage \_\_\_\_\_
- c. Current residence address \_\_\_\_\_
- d. City, state, and zip code \_\_\_\_\_
- e. **If consulting regarding a divorce**, (if not, proceed to "f") is this the marital residence? \_\_\_\_\_. If so, do you and your spouse own or rent the residence? \_\_\_\_\_  
If own: Value? \_\_\_\_\_ Amount owed on mortgage(s)? \_\_\_\_\_  
Name(s) on deed? \_\_\_\_\_  
Name(s) on mortgage? \_\_\_\_\_  
Date of purchase? \_\_\_\_\_
- f. Telephone: Home: \_\_\_\_\_ Mobile: \_\_\_\_\_ Work: \_\_\_\_\_
- g. E-mail Address: \_\_\_\_\_
- i. How long have you lived in Florida? \_\_\_\_\_
- j. Are you currently represented by an attorney? \_\_\_\_\_. If so, whom? \_\_\_\_\_

2. **If consulting regarding a divorce**, are you currently separated? \_\_\_\_\_ Date of Separation? \_\_\_\_\_. If consulting on a modification, are you currently divorced? \_\_\_\_\_ If so, what was the date of the final judgment of dissolution? \_\_\_\_\_.

3. **If consulting regarding a divorce**, in what County did you and your spouse last live together? \_\_\_\_\_. Do you and your spouse own real property in that county? \_\_\_\_\_

4. **If consulting regarding a divorce**, please provide your date of your marriage (month/day/year) \_\_\_\_\_  
Place of your marriage (City, State) \_\_\_\_\_

**FEMALE MARRIED CLIENT'S ONLY:** Do you want a maiden or prior name restored? \_\_\_\_\_  
If yes, please provide the full name: \_\_\_\_\_

5. Please provide the following information concerning your employment and income.

- a. Employer \_\_\_\_\_
- b. Job title \_\_\_\_\_
- c. **Gross** monthly income from all sources (rent, social security, worker's compensation, investments, alimony, unemployment):  
\_\_\_\_\_

6. Please provide the following information about the opposing party (for example: your current spouse, former spouse, &/or child(ren)'s other parent)

- a. Full Name \_\_\_\_\_  
Any other name(s) this individual uses or has used previously:  
\_\_\_\_\_
- b. Highest degree of education \_\_\_\_\_  
Portion completed before marriage \_\_\_\_\_
- c. Current residence address \_\_\_\_\_
- d. City, state, and zip code \_\_\_\_\_
- e. **If consulting regarding a divorce**, (if not, proceed to "f") is this the marital residence? \_\_\_\_\_  
If so, do you and your spouse own or rent the residence? \_\_\_\_\_  
  
If own: Value? \_\_\_\_\_ Amount owed on mortgage(s)? \_\_\_\_\_  
Name(s) on deed? \_\_\_\_\_  
Name(s) on mortgage? \_\_\_\_\_  
Date of purchase? \_\_\_\_\_
- f. Employer \_\_\_\_\_
- g. Job title \_\_\_\_\_
- h. **Gross** monthly income from all sources (rent, social security, worker's compensation, investments, alimony, unemployment):  
\_\_\_\_\_

- i. The opposing party's attorney(s), if known: \_\_\_\_\_
7. Have there been prior court proceedings between you and the opposing party? \_\_\_\_\_  
 If you answered "yes", what type of proceeding(s) (for example, child support, domestic violence injunction)? \_\_\_\_\_  
 In what county? \_\_\_\_\_
8. Are there any children under the age of 18 common to you and the opposing party? \_\_\_\_\_  
 If you answered "no", please proceed to number question 12.  
 If you answered "yes", please list their *first* names, sex and date of birth below:  
 \_\_\_\_\_  
 \_\_\_\_\_
- a. Do you employ day care for your child(ren)? \_\_\_\_\_  
 What is the cost per week? \_\_\_\_\_  
 Who pays? \_\_\_\_\_
- b. Are your child(ren) insured under a health insurance plan? \_\_\_\_\_  
 What is the cost per month? \_\_\_\_\_  
 Who pays the monthly premiums? \_\_\_\_\_
9. Are you or the opposing party currently represented by the Child Support Enforcement Agency? \_\_\_\_\_. If "yes", who is represented by this agency? \_\_\_\_\_
10. Have you or the opposing party been *accused* of domestic violence? \_\_\_\_\_
- a. If "yes", is there an injunction for protection against domestic violence in place? \_\_\_\_\_  
 If "yes", are you the petitioner or respondent? \_\_\_\_\_
- b. If "yes", is there a court date pending? \_\_\_\_\_. When is the court date? \_\_\_\_\_  
 Are you the petitioner or respondent? \_\_\_\_\_
- c. If "yes", has anyone been arrested for domestic battery? \_\_\_\_\_  
 If so, whom? \_\_\_\_\_ and on what date? \_\_\_\_\_  
 Are *criminal* charges pending? \_\_\_\_\_
11. Do you and the opposing party agree on sharing parental responsibility of your minor child(ren)? \_\_\_\_\_  
 If you answered "yes" have you discussed a parenting and contact schedule? \_\_\_\_\_
- If you answered "no" do you believe any of the following will become issues in developing a parenting plan and/or contact schedule?  
 \_\_\_\_\_ distance between homes;  
 \_\_\_\_\_ safety concerns for yourself;  
 \_\_\_\_\_ safety concerns for your child(ren)
12. **If consulting regarding a divorce**, do you or your spouse own real property other than the marital home? \_\_\_\_\_. If you answered "yes", please provide the following:

Address: \_\_\_\_\_  
Value? \_\_\_\_\_ Amount owned on mortgage(s)? \_\_\_\_\_  
Name(s) on deed? \_\_\_\_\_  
Name(s) on mortgage? \_\_\_\_\_  
Date of purchase? \_\_\_\_\_

13. **If consulting regarding a divorce**, list any pension, retirement, 401K, IRA, stocks, bonds, mutual funds or other investments owned by your or your spouse and provide the following for each account:

a. Type of account? \_\_\_\_\_  
How is the account titled? \_\_\_\_\_  
Value of account? \_\_\_\_\_  
When was the account opened? \_\_\_\_\_

b. Type of account? \_\_\_\_\_  
How is the account titled? \_\_\_\_\_  
Value of account? \_\_\_\_\_  
When was the account opened? \_\_\_\_\_

c. Type of account? \_\_\_\_\_  
How is the account titled? \_\_\_\_\_  
Value of account? \_\_\_\_\_  
When was the account opened? \_\_\_\_\_

d. Type of account? \_\_\_\_\_  
How is the account titled? \_\_\_\_\_  
Value of account? \_\_\_\_\_  
When was the account opened? \_\_\_\_\_

14. **If consulting regarding a divorce**, list any other major assets owned by you and/or your spouse (cars, boats, jewelry collectibles, RV(s): \_\_\_\_\_  
\_\_\_\_\_

15. **If consulting regarding a divorce**, list all debts incurred during the marriage, including approximate balances owed (excluding mortgage(s) on real property) and whose name(s) appears on the debt: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

16. **If consulting regarding a divorce**, what are the approximate monthly expenses associated with maintaining the marital home:

mortgage/rent: \$ \_\_\_\_\_  
utilities \$ \_\_\_\_\_  
taxes/insurance \$ \_\_\_\_\_  
cable/internet/phone \$ \_\_\_\_\_  
association fees \$ \_\_\_\_\_

pool/lawn/security \$ \_\_\_\_\_

17. **If consulting regarding a divorce**, describe any special contributions you believe you have made to your spouse's career, education and/or assets: \_\_\_\_\_

\_\_\_\_\_

18. **If consulting regarding a divorce**, please identify all major assets or debts which were acquired prior to the date of your marriage (including inheritance) and identify whose name the debt/asset is titled under:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

19. Were you referred to our office, if so, by whom? \_\_\_\_\_

20. Do you have any reason to believe the opposing party has consulted with, or been previously represented by, one of the following attorneys: E. JON WEIFFENBACH or TERESA KAKLIS DEES? \_\_\_\_\_.

**I hereby agree to pay the sum of \$300.00\* representing my initial consultation fee prior to services being rendered. I further represent that the foregoing information is true and correct to the best of my knowledge.**

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\* Weiffenbach & Kaklis gladly accepts Discover, Visa and MasterCard for payment of consultation fees and retainers. We also accept personal checks, money orders, cashier's checks and cash.