

CONFIDENTIAL

MARITAL AGREEMENT INFORMATION

A worksheet produced exclusively for the clients of



4500 Cherry Creek Drive South
Suite 625
Denver, Colorado 80246
303.292.3228

Prepared on: _____, 20 _____

PERSONAL INFORMATION:

	YOU	SPOUSE
LEGAL NAME:		
PARTNER'S NAME:		
WEDDING DATE:		
HOME ADDRESS:		
COUNTY:		
HOME PHONE:		
EMAIL ADDRESS:		
YOUR OCCUPATION:		
PARTNER'S OCCUPATION:		
YOUR HEALTH INSURANCE CARRIER:		
PARTNER'S HEALTH INSURANCE CARRIER:		
BUSINESS ADDRESS:		
BUSINESS PHONE:		
CELL PHONE:		
REFERRED BY:		
CITY RESIDING IN AFTER WEDDING DATE:		
PARTNER'S ATTORNEY:		

CHILDREN:

Any current children? (Check one):	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Any children expected? (Check one):	<input type="checkbox"/> Yes	<input type="checkbox"/> No

FINANCIAL OBLIGATIONS:

DESCRIPTION OF FINANCIAL OBLIGATION:	MONTHLY BASIS OF OBLIGATION:

TAXABLE INCOME:

Estimated 2021 taxable income:	\$
Estimated 2020 taxable income:	\$
Estimated 2019 taxable income:	\$

PRIORITIES (Upon Death and Upon Divorce)

What are your priorities in the preparation of your Marital Agreement? Do you have any special concerns?

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ADVISORS

Accountant:	
Financial Advisor:	
Insurance:	

PLEASE BRING TO THE MEETING

<input type="checkbox"/> Last three years of income tax returns	<input type="checkbox"/> Copy of any trust in which you are a beneficiary
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