

## MATRIMONIAL PROPERTY QUESTIONNAIRE

Your Name .....

Your Address .....

Your Date of Marriage .....

The values we need are those for the date you and your partner separated. Where your date of separation is “not yet” please give us the most recent value you have for each asset and the date of that valuation.

Date of Separation:		Today's Date:	
---------------------	--	---------------	--

If any items of property were entirely or partly acquired by gift or inheritance to either of you, please make this clear: it affects how far it / they might be considered to be matrimonial property.

<b>1. The Matrimonial Home</b>	
<b>Address:</b>	
Is it owned/rented?	Owned/rented
Who is the owner/tenant?	Me/My partner/jointly
Have you had the property valued, if it's <u>owned</u> ?	YES/NO
If, YES was that by an Estate Agent?	YES/NO
Or by a Surveyor?	YES/NO
What was the date of the survey?	
What was the amount of the valuation?	£
If you don't have an "official" valuation, what do you think the property might be worth, if it was sold now?	£
If you have obtained a survey of the property, please let us have a copy of the survey.	

<b>2. Mortgage</b>
--------------------

A Bank or Building Society will have advanced you the money to buy the property. Please give us their name, address and loan reference number.	
--	--

Do you know how much of the loan is outstanding? If you have a recent statement showing the level of mortgage outstanding, please give us a copy.	£
If there is more than one loan over the house (say, "a second mortgage"), please let us have details of any other lenders involved and the outstanding balance to them.	

**3. Holiday Homes or other property (including Timeshares)**

Please give details of any holiday home or other property (including Timeshares) you own, together with values. Please indicate if the value is an estimate or whether any "official" valuation has been obtained (and the identity of any such valuer).

Who is the owner:	Me / My Partner / Jointly
Who possesses the documents which confirm ownership?	

**4. Bank Accounts**

Please give us details of any credit balances in Bank accounts held by you or your partner. Please make it clear whether the accounts are yours, your partner's or joint.

<u>Name</u>	<u>Address</u>	<u>Account No.</u>	<u>Balance (at date of separation)</u>	<u>Balance (now)</u>

If you have copies of statements confirming these figures please let us have them.

**5. Investments and Shares**

We need details of any shareholdings or other investments held by you, your partner or jointly. Please provide values, giving a note of whose name they are in. Tell us if the value is an estimate. If it's an "official" valuation, please let us know who did the valuation.

<u>Company</u>	<u>Shareholdings &amp; Investments</u>	<u>Value</u>

## 6. Household Contents

Please try to give us some idea of the value of the household contents. Tell us whether this is your estimate or whether it has been valued professionally. If it's a professional valuation, please tell us the details of valuer. **Please note that the value we need is the resale value of each item, not the replacement value.**

Have any of the contents already been divided between you and, if so, which items to whom?

## 7. Vehicles

Do you own a car?	YES/NO	Does your partner own a car?	YES/NO
If YES, please give us the model and registration no.		<u>My Car</u>	<u>My Partner's Car</u>
What was the value of the vehicle?		£	£
Is this an estimate?		YES/NO	YES/NO
If NO, was the valuation provided by a professional valuer?		YES/NO	YES/NO
If so, could you supply a copy of the valuation?		YES/NO	YES/NO

## 8. Pension Fund

Have you been in an occupational pension scheme?	YES/NO
--	--------

If YES, could you please attach (or request and forward to us) a Cash Equivalent Transfer Value (CETV) for this, if possible, from the period you have worked during the marriage up until the date of separation. (You can ask the pension fund for this, though they may not provide it calculated for the exact period we need. An apportionment may be required, to get the relevant figure here).

Have you had a private pension policy?	YES/NO
--	--------

If YES, please give details of the Company involved and let us have (or request and provide to us) a Cash Equivalent Transfer Value (CETV) for this, if possible, from the period you have worked during the marriage up until the date of separation.

Was your partner in an occupational pension scheme?	YES/NO
---	--------

If YES, for what length of time (start / finish dates or approx.) and with which employer, during the time you were married and living together?

Did your partner have a private pension policy?	YES/NO
---	--------

If YES, please give us as much detail about it as you can:

Are there any state scheme pensions rights for you? Or your partner?	YES/NO/DON'T KNOW
--	-------------------

**9. Endowment Policies**

Please give us information about the name, address and policy number for each policy and its surrender value, if known. If you would prefer us to obtain the surrender value, please tell us and we will send you a mandate for signature (we will need to show we have your written permission).  
If you have obtained a surrender value, please let us have a copy of it.

<u>Company</u>	<u>Policy no.</u>	<u>Surrender Value</u>	<u>In name of You/ Your Partner or Joint</u>
----------------	-------------------	------------------------	--

If any of the policies were taken out before the date of marriage, please give us the date the policy started.

Who has the original policy documents?

**10. Business Property**

Do you have any interest in a business that started after the date of marriage?	YES/NO
---	--------

If YES, please give details and attach accounts for the last 3 years, if possible.

Does your partner have any interest in a business which started after the date of marriage?	YES/NO
---	--------

If YES, please give as much detail as possible.

## 12. Other Assets

Please give details of any other assets either of you owned or which you think might have significant value.

## LIABILITIES

It will help if you can provide copy statements for any liabilities.

Do <b>you</b> have any Bank loans?	YES/NO
------------------------------------	--------

If YES, please give details		
<u>Bank &amp; Address</u>	<u>Account number</u>	<u>Balance</u>

Does your <b>partner</b> have any Bank loans?	YES/NO
---	--------

If YES, please give details		
<u>Bank &amp; Address</u>	<u>Account number</u>	<u>Balance</u>

Do you have any <b>joint</b> Bank loans?	YES/NO
--	--------


If YES, please give details		
<u>Bank &amp; Address</u>	<u>Account number</u>	<u>Balance</u>

Do you have a car loan?	YES/NO	Does your partner have a car loan?	YES/NO
If YES, please give details of lenders and amounts outstanding.			
You	Lender:		Amount: £
Your Partner	Lender:		Amount: £

Do you have credit card debts at all?		YES/NO
If YES, please give details		
<u>Bank &amp; Address</u>	<u>Reference number</u>	<u>Balance</u>

Does your partner have any credit card debts?		YES/NO
---	--	--------

If YES, please give details		
<u>Bank &amp; Address</u>	<u>Reference number</u>	<u>Balance</u>

Please give details of any other loans you know of - which were owed by you or your partner - at the date you separated.		
		

Do you think any of the assets have gone up substantially in value since you separated?		YES/NO
If YES, please give details.		

Have any of the debts been reduced more by one or other of you (or entirely by one of you) since the separation?		YES/NO
If YES, please give details.		

Have any of the assets been wholly or partly acquired by either you or your partner as a gift or inheritance or from pre-marriage financial resources?		YES/NO
If YES, please give details.		

Did either of you own any of the assets before the marriage?		YES/NO
If YES, please give details about which one(s) and dates they were acquired.		