



Syndicate Subscription Legal Plans

PALIMONY CLIENT INTAKE QUESTIONNAIRE:

DEADLINES APPLY: In California, claims based on an oral agreement generally must be filed within 2 years, and on a written agreement within 4 years, of when the promise was broken. If your partner has died, estate claim deadlines can be much shorter. Contact us promptly.

CONFIDENTIAL. "Palimony" refers to claims between unmarried partners who lived together, usually based on a written, oral, or implied agreement to share property or provide support. These are civil contract claims, not divorce claims, and the rules vary widely by state. This form is for partners seeking to enforce such an agreement and for partners defending against a claim. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

You are:

☐ Seeking support or property from a former partner

☐ Defending against a palimony claim

☐ My partner has died

☐ Full Legal Name: _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

Is it safe to contact you at the phone and email listed? ☐ Yes ☐ No

PART 1 — THE RELATIONSHIP

1.1 Partner's full name: _____ Date of Birth: _____

Partner's address / phone: _____

Partner's occupation / employer: _____

1.2 Relationship began: _____

Lived together from: _____ To: _____

1.3 Date of separation: _____

Are you still living together? ☐ Yes ☐ No

1.4 States where you lived together: _____

1.5 Were you ever married to each other or registered domestic partners? ☐ Yes ☐ No

Registered domestic partners and spouses are covered by family law instead. Please also complete our Divorce Intake Form.

1.6 Was either of you married to someone else during the relationship? ☐ Yes ☐ No

If yes, explain: _____



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1.7 Do you have children together? ☐ Yes ☐ No

Children's custody and support are decided separately under family law. Please also complete our Child Custody and Child Support forms.

1.8 Did you present yourselves to others as a married couple? ☐ Yes ☐ No

PART 2 — THE AGREEMENT

2.1 Type of agreement:

☐ Written agreement

☐ Oral (spoken) agreement

☐ Implied by our conduct

☐ No agreement

☐ Not sure

2.2 When and where was the agreement made? _____

2.3 What exactly was promised (e.g., lifetime support, half of property, "I will always take care of you")? _____

2.4 Evidence of the agreement:

☐ Written contract

☐ Texts / emails / letters

☐ Cards / notes

☐ Will or trust naming me

☐ Joint accounts / property in both names

☐ Witnesses who heard the promise

☐ Social media posts

☐ Other

Witness Name	Relationship	Phone / Email	What They Heard or Saw



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Courts will not enforce an agreement based on sexual relations, but will enforce agreements about earnings, property, and support.

PART 3 — CONTRIBUTIONS DURING THE RELATIONSHIP

Contribution	You	Partner
Paid household expenses		
Paid mortgage / rent		
Worked in partner's business		
Homemaking / caregiving		
Raised children		
Gave up a job, education, or career		
Moved to a new city / state		
Contributed money or property		

3.1 Describe your most important contributions and any sacrifices you made: _____

PART 4 — PROPERTY & DEBTS

Asset (home, accounts, business, vehicles, retirement)	Whose Name?	Who Paid?	Est. Value \$

Debt	Whose Name?	Balance \$	What It Was For

4.1 Partner's estimated income / net worth: \$ _____

PART 5 — THE BREAKUP & THE BROKEN PROMISE

5.1 Date the promise was broken (support stopped, property refused, etc.): _____

5.2 What happened? _____



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5.3 Is your partner providing any support now? ☐ Yes ☐ No

If yes, explain: _____

5.4 Have you demanded payment or property in writing? ☐ Yes ☐ No

If yes, explain: _____

5.5 What are you seeking?

☐ Ongoing support

☐ Lump-sum payment

☐ Share of property

☐ Return of money I contributed

☐ Negotiated settlement

☐ Mediation

PART 6 — DEFENDING A CLAIM

6.1 What have you received?

☐ Demand letter

☐ Lawsuit served

☐ Verbal threat of a claim

6.2 Date received / served: _____ Response deadline: _____

Court / Case No. (if any): _____

6.3 Your response to the claimed agreement (was there any promise?): _____

6.4 Did you and your partner sign a cohabitation agreement or waiver? ☐ Yes ☐ No

PART 7 — IF YOUR PARTNER HAS DIED

7.1 Date of death: _____ County / state of residence at death: _____

7.2 Estate documents / proceedings:

☐ Will

☐ Trust

☐ Probate case opened

☐ None / not sure

Executor / trustee name: _____

7.3 Were you named in the will, trust, or as a beneficiary on any account? ☐ Yes ☐ No

If yes, explain: _____

PART 8 — SAFETY, GOALS & DOCUMENTS

8.1 Has there been domestic violence, threats, or a restraining order? ☐ Yes ☐ No

Please provide copies of the following, if available. Check each item you are including.

☐ Written agreements

☐ Texts / emails / letters / cards

☐ Photos showing life together

☐ Deeds / titles / leases



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- | | |
|--|---|
| ☐ Bank / credit statements | ☐ Proof of payments you made |
| ☐ Business records | ☐ Wills / trusts / beneficiary forms |
| ☐ Demand letters / court papers | ☐ Witness list |

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my palimony matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.