



Syndicate Subscription Legal Plans

LEGAL SEPARATION CLIENT INTAKE QUESTIONNAIRE:

SERVED WITH A PETITION? There is a short deadline to respond — contact us right away. If you are in danger, call 911. National Domestic Violence Hotline: 1-800-799-7233.

CONFIDENTIAL. A legal separation resolves the same issues as a divorce (custody, visitation, child and spousal support, and division of property and debts), but the spouses or domestic partners remain legally married. This form may be completed by the spouse who is filing, the spouse who was served, or both spouses together if you agree. If a question does not apply, write "N/A." If unknown, write "Unknown."

PART 1 — WHO IS COMPLETING THIS FORM?

1.1 Your role:

- ☐ Petitioner — I want to file (or have filed) for legal separation
☐ Respondent — my spouse filed and I was served
☐ Both spouses together — we agree to a legal separation
☐ Undecided — separation or divorce?

1.2 Relationship type:

- ☐ Marriage ☐ Registered domestic partnership

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 2 — WHY LEGAL SEPARATION?

2.1 Reasons (check all that apply):

- ☐ Religious or moral beliefs ☐ Hope to reconcile
☐ Keep health insurance coverage ☐ Keep pension / Social Security benefits
☐ Tax reasons ☐ Residency for divorce not yet met
☐ Children / family reasons ☐ Not sure divorce is right

Some benefits (such as health coverage through a spouse's employer) may end with a legal separation judgment under the plan's terms. Please check with the plan before filing.

2.2 Does the other spouse also want a legal separation (rather than a divorce)? ☐ Yes ☐ No

In California, a court generally will not grant a legal separation unless both spouses agree or the other spouse does not respond. If the other spouse asks for a divorce, the court will generally grant the divorce.

2.3 Would you consider marriage counseling or mediation? ☐ Yes ☐ No

PART 3 — THE SPOUSES / PARTNERS

3A Spouse 1 (you, or Petitioner if joint):

Last Name: _____ First: _____ Middle: _____



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Other names used: _____ Date of Birth: _____
Address: _____
City: _____ County: _____ State: _____ Zip: _____
Phone: _____ Email: _____
Occupation / Employer: _____ Gross Monthly Income: \$ _____
Time living in current state: _____ In current county: _____

3B Spouse 2:

Last Name: _____ First: _____ Middle: _____
Other names used: _____ Date of Birth: _____
Address: _____
City: _____ County: _____ State: _____ Zip: _____
Phone: _____ Email: _____
Occupation / Employer: _____ Gross Monthly Income: \$ _____
Time living in current state: _____ In current county: _____

3.1 Does Spouse 2 have a lawyer? ☐ Yes ☐ No

California has no minimum residency requirement to file for legal separation, unlike divorce. The case can later be converted to a divorce once residency requirements are met.

PART 4 — THE MARRIAGE / PARTNERSHIP

4.1 Date of marriage / registration: _____ City, State: _____
4.2 Date of separation: _____
4.3 Are you still living in the same home? ☐ Yes ☐ No
4.4 Is there a prenuptial or postnuptial agreement? ☐ Yes ☐ No
4.5 Has a divorce or separation case been filed before? ☐ Yes ☐ No
If yes — court, case number, and outcome: _____

PART 5 — CHILDREN

5.1 Are there minor children of the relationship, or is either spouse pregnant? ☐ Yes ☐ No

Child's Name	Date of Birth	Lives Primarily With	State Lived In (last 6 months)



☐ Fully agreed ☐ Partially agreed ☐ Not agreed ☐ No children

☐ Fully agreed ☐ Partially agreed ☐ Not agreed ☐ No children

PART 6—SPOUSAL SUPPORT

☐ Seeking to receive ☐ Seeking to avoid / limit paying
☐ Agreed amount ☐ Neither spouse requesting
☐ Not sure

PART 7 — PROPERTY, DEBTS & COURT COSTS

☐ Home / real estate	☐ Retirement / pension accounts
☐ Bank / investment accounts	☐ Business interest
☐ Vehicles	☐ Credit card / loan debt
☐ Tax debts	☐ Separate / inherited property

☐ Fully agreed ☐ Partially agreed ☐ Not agreed

☐ Each pays own ☐ Split equally ☐ One spouse pays ☐ Not decided

PART 8 — INSURANCE, TAXES & ESTATE PLANNING

☐ Married filing jointly ☐ Married filing separately ☐ Head of household
☐ Single ☐ Need advice

8.4 Would you like help updating your estate plan and beneficiaries? ☐ Yes ☐ No



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PART 9 — SAFETY

9.1 Has there been domestic violence, threats, or stalking? ☐ Yes ☐ No

9.2 Is there a current or past restraining order? ☐ Yes ☐ No

9.3 Do you need emergency orders (custody, support, use of the home)? ☐ Yes ☐ No

If yes to any, explain briefly (we will discuss details privately): _____

PART 10 — IF YOU WERE SERVED

10.1 Date served: _____ Court / County / Case No.: _____

10.2 Response deadline: _____ Next hearing date: _____

10.3 Your position:

☐ Agree to legal separation

☐ Prefer a divorce

☐ Disagree with some requests

☐ Not sure

PART 11 — DOCUMENT CHECKLIST

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

☐ Marriage certificate / registration

☐ Papers filed or served

☐ Prenuptial / postnuptial agreement

☐ Tax returns (last 2 years)

☐ Pay stubs (last 2 months)

☐ Bank / retirement statements

☐ Deeds / mortgage statements

☐ Debt statements

☐ Health insurance plan information

☐ Existing wills / trusts / beneficiary forms

Certification:

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

Signed and dated this ____ day of _____, 20__

Signature (Spouse 1): _____

Print Name: _____

Signature (Spouse 2, if joint): _____

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.