



Syndicate Subscription Legal Plans

COHABITATION AGREEMENT CLIENT INTAKE QUESTIONNAIRE:

CONFIDENTIAL. A cohabitation agreement is a written contract between unmarried partners who live together (or plan to) that sets out how property, finances, and support will be handled during the relationship and if it ends. Unmarried partners do not automatically have the property or inheritance rights of spouses, so a clear written agreement is important. Each partner should have separate, independent legal representation; Syndicate can represent only one partner. If a question does not apply, write "N/A." If unknown, write "Unknown." Attach additional pages if needed.

NAME OF THE CLIENT:

☐ Full Legal Name: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — YOUR GOALS

1.1 What are you seeking? (check all that apply):

☐ Prepare a new cohabitation agreement

☐ Review / negotiate an agreement drafted by my partner's representative

☐ Update or revoke an existing agreement

☐ Enforce an agreement after a breakup

☐ Advice on rights after a breakup with no written agreement

☐ Not sure — need advice

1.2 Main objectives:

☐ Protect property I already own

☐ Define ownership of a shared home

☐ Share or separate our earnings

☐ Split household expenses fairly

☐ Keep debts separate

☐ Address support if we separate

☐ Plan for death or incapacity

☐ Protect a business

☐ Address pets

☐ Other

1.3 Desired completion date and reason (move-in, home purchase, etc.): _____

1.4 In your own words, what do you and your partner want this agreement to accomplish? _____

PART 2 — THE PARTNERS

2A You:

Last Name: _____ First: _____ Middle: _____

Other names used: _____ Date of Birth: _____



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Address: _____
City: _____ County: _____ State: _____ Zip: _____
Phone: _____ Email: _____
Occupation / Employer: _____ Gross Monthly Income: \$ _____

2B Your Partner:

Last Name: _____ First: _____ Middle: _____
Other names used: _____ Date of Birth: _____
Address: _____
City: _____ County: _____ State: _____ Zip: _____
Phone: _____ Email: _____
Occupation / Employer: _____ Gross Monthly Income: \$ _____

2.1 Date you began living together (or planned move-in date): _____

2.2 Length of relationship: _____

2.3 Are you, or have you ever been, registered domestic partners with each other? ☐ Yes ☐ No

Registered domestic partners generally have the same property rights as spouses and would need a different type of agreement.

2.4 Do you plan to marry or register as domestic partners in the future? ☐ Yes ☐ No

If you later marry, a cohabitation agreement may not satisfy the separate legal requirements for a premarital agreement.

2.5 Is either partner still legally married to someone else, or in a pending divorce? ☐ Yes ☐ No

If yes, explain: _____

2.6 Has either partner been married or had a cohabitation agreement before? ☐ Yes ☐ No

If yes, explain: _____

2.7 Is either partner paying or receiving child or spousal support? ☐ Yes ☐ No

If yes, explain: _____

2.8 Does your partner have (or plan to have) their own lawyer? ☐ Yes ☐ No

If yes — Name / Firm / Phone: _____



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PART 3 — FINANCIAL DISCLOSURE

Both partners should fully disclose their assets, debts, and income. A complete exchange of this information makes the agreement much harder to challenge later.

3A Your Assets & Debts:

Asset (home, accounts, retirement, vehicles, business, other)	Titled To	Est. Value \$	Loans / Liens \$

Debt (credit cards, student loans, auto, personal, taxes)	Creditor	Balance \$	Monthly Pmt \$

3B Your Partner's Assets & Debts (to the best of your knowledge):

Asset (home, accounts, retirement, vehicles, business, other)	Titled To	Est. Value \$	Loans / Liens \$

Debt (credit cards, student loans, auto, personal, taxes)	Creditor	Balance \$	Monthly Pmt \$



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3.1 Does either partner expect an inheritance, gift, or significant future income? ☐ Yes ☐ No

If yes, explain: _____

PART 4 — THE HOME

4.1 Address of shared residence: _____

4.2 Ownership / lease:

☐ Owned by me

☐ Owned by my partner

☐ Owned jointly

☐ Rented — lease in my name

☐ Rented — lease in partner's name

☐ Rented — lease in both names

☐ Planning to buy together

If owned — how title is held: _____ Purchase date: _____

Purchase price: \$ _____ Current value: \$ _____ Mortgage balance: \$ _____

Down payment contributed — You: \$ _____ Partner: \$ _____

4.3 Who should build ownership / equity in the home?

☐ Only the owner

☐ Both, equally

☐ Both, in proportion to contributions

☐ Non-owner pays rent to owner

☐ Other

4.4 If you separate, what should happen with the home?

☐ Owner stays; other moves out

☐ Sell and divide proceeds

☐ One buys out the other

☐ Other

Move-out notice period (days) and buyout terms: _____

4.5 Will either partner pay for major improvements to a home the other owns? ☐ Yes ☐ No

If yes, explain: _____

PART 5 — PROPERTY & EARNINGS DURING THE RELATIONSHIP

5.1 Earnings:

☐ Each partner's earnings stay separate

☐ All earnings are shared / joint

☐ Some shared (explain below)

5.2 Property bought during the relationship should be:

☐ Separate property of the buyer

☐ Owned jointly

☐ Owned according to title

☐ Owned in proportion to contribution



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5.3 Will you have joint bank accounts? ☐ Yes ☐ No

If yes, how will they be funded and divided if you separate? _____

5.4 Does either partner own a business or professional practice? ☐ Yes ☐ No

If yes, explain: _____

5.5 Will either partner contribute to the other's business or education? ☐ Yes ☐ No

If yes, explain: _____

5.6 How should gifts between partners be treated (e.g., jewelry, vehicles)? _____

5.7 Specific items that must remain one partner's property (heirlooms, collections, vehicles, retirement accounts): _____

PART 6 — HOUSEHOLD EXPENSES

6.1 How will shared living expenses be divided?

☐ Split 50 / 50

☐ In proportion to income

☐ One partner pays all / most

☐ By category (see table)

Expense	Me	Partner	Shared
Rent or mortgage	☐	☐	☐
Property taxes & homeowner's insurance	☐	☐	☐
Utilities / internet	☐	☐	☐
Groceries & household supplies	☐	☐	☐
Repairs & maintenance	☐	☐	☐
Vehicles	☐	☐	☐
Vacations & entertainment	☐	☐	☐
Pet care	☐	☐	☐

PART 7 — DEBTS

7.1 Debt responsibility:

☐ Each partner responsible for own debts

☐ Joint debts shared equally

☐ Joint debts shared by proportion

☐ Other

7.2 Will either partner co-sign or guarantee a loan for the other? ☐ Yes ☐ No

If yes, explain: _____

7.3 Should credit cards / loans in both names be restricted or require consent? ☐ Yes ☐ No



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PART 8 — SUPPORT IF YOU SEPARATE

Unmarried partners have no automatic right to spousal support, but partners may agree in writing to provide support.

8.1 Preference:

- ☐ No support either way (mutual waiver)
- ☐ Lump-sum payment
- ☐ Monthly support for a set period
- ☐ Amount based on length of relationship
- ☐ Not sure — need advice

8.2 Is either partner giving up a career, income, or home to live together? ☐ Yes ☐ No

If yes, explain: _____

8.3 Any specific support terms you want (amount, duration, conditions): _____

PART 9 — CHILDREN & PETS

9.1 Do either of you have children, or plan to have children together? ☐ Yes ☐ No

Child's Name	Age	Parent(s)	Lives With You?

An agreement between partners cannot limit a child's right to support or decide custody; those are determined by the court based on the child's best interest.

Pet Name / Type	Owned By	Who Keeps the Pet if You Separate?

PART 10 — DEATH & INCAPACITY

Unmarried partners generally do not inherit from each other unless named in a will, trust, or beneficiary designation.

10.1 Existing documents (check all that apply):

- ☐ Will ☐ Living trust ☐ Durable power of attorney
- ☐ Advance health care directive ☐ None

10.2 Should a surviving partner be able to stay in the home for a time? ☐ Yes ☐ No

If yes, for how long? _____

10.3 Do you want to name each other on life insurance or retirement accounts? ☐ Yes ☐ No

10.4 Would you like help preparing a will, trust, POA, or health care directive? ☐ Yes ☐ No



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PART 11 — ENDING THE AGREEMENT & DISPUTES

11.1 Events that end the relationship for purposes of the agreement:

- ☐ Moving out with intent to end the relationship
- ☐ Written notice by either partner
- ☐ Marriage / domestic partnership registration
- ☐ Death of a partner

11.2 How should disputes be resolved?

- ☐ Mediation first
- ☐ Binding arbitration
- ☐ Court
- ☐ Not sure

11.3 Should the agreement be reviewed on a schedule (e.g., every 5 years)? ☐ Yes ☐ No

11.4 Anything else you want included or excluded: _____

PART 12 — DOCUMENT CHECKLIST

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

- | | |
|---|---|
| ☐ Government-issued photo ID | ☐ Recent tax return |
| ☐ Deeds / mortgage statements | ☐ Lease agreement |
| ☐ Bank & investment statements | ☐ Retirement account statements |
| ☐ Debt statements | ☐ Business documents |
| ☐ Existing wills / trusts | ☐ Prior agreements or court orders |

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 preparing or reviewing my cohabitation agreement.

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.