



Syndicate Subscription Legal Plans

PRENUPTIAL AGREEMENT **CLIENT INTAKE QUESTIONNAIRE:**

START EARLY. In most states, a party must be given the agreement, and advised in writing to consult their own lawyer, at least 7 calendar days before signing. Signing close to the wedding, or without independent counsel and full financial disclosure, is the most common reason prenuptial agreements are thrown out.

CONFIDENTIAL. A prenuptial (premarital) agreement is a written contract signed before marriage or registered domestic partnership that takes effect when the parties marry. It can address property, debts, and (with limits) spousal support. Each party should have separate, independent legal representation; Syndicate can represent only one party. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

☐ Full Legal Name: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

Wedding / registration date: _____ Date agreement is needed by: _____

PART 1 — YOUR GOALS

1.1 What do you need?

☐ Prepare a new prenuptial agreement

☐ Review an agreement my fiancé(e) proposed

☐ Negotiate changes to a draft

☐ Convert to a postnuptial agreement

1.2 Reasons (check all that apply):

☐ Protect property I own now

☐ Protect a business or professional practice

☐ Keep inheritances or family gifts separate

☐ Protect children from a prior relationship

☐ Keep debts separate (student loans, credit cards)

☐ Address spousal support

☐ Protect future earnings or stock / equity

☐ Clarify who pays household expenses

☐ Estate planning coordination

☐ Other

1.3 In your own words, what do you want the agreement to accomplish? _____

PART 2 — THE PARTIES

2A You:

Full Legal Name: _____ Date of Birth: _____

Address: _____

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

Phone: _____ Email: _____

Occupation / Employer: _____ Gross Monthly Income: \$ _____



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Prior marriages / registered partnerships (dates, how ended): _____

2B Your Fiancé(e) / Partner:

Full Legal Name: _____ Date of Birth: _____

Address: _____

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

Phone: _____ Email: _____

Occupation / Employer: _____ Gross Monthly Income: \$ _____

Prior marriages / registered partnerships (dates, how ended): _____

2.1 How long have you been together? _____ Living together? _____

Children (including from prior relationships)	Age	Parent(s)	Support Obligations?

2.2 Is either party a citizen of, or do they own property in, another country? ☐ Yes ☐ No

If yes, explain: _____

Agreements involving foreign property or citizenship may need extra provisions to be effective abroad.

PART 3 — FINANCIAL DISCLOSURE

Both parties must fully disclose assets, debts, and income. Incomplete disclosure is a common reason agreements are set aside.

3A Your Assets & Debts:

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

Debt (student loans, credit cards, mortgage, taxes)	Whose Name	Balance \$	Monthly Payment \$



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

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

Debt (student loans, credit cards, mortgage, taxes)	Whose Name	Balance \$	Monthly Payment \$

3.1 Does either party own a business or professional practice? ☐ Yes ☐ No

Name, ownership %, estimated value: \$ _____

3.2 Does either party expect an inheritance, trust distribution, or stock vesting? ☐ Yes ☐ No

If yes, explain: _____

3.3 Does either party have significant student loans or other debts? ☐ Yes ☐ No

PART 4 — PROPOSED TERMS

4.1 Property:

Terms to address:

- ☐ Each party keeps property owned before marriage
- ☐ Earnings during marriage stay separate
- ☐ Earnings during marriage are shared
- ☐ Inheritances and gifts stay separate
- ☐ Business stays separate (including growth)
- ☐ The home — ownership and what happens on divorce
- ☐ Retirement accounts
- ☐ Appreciation of separate property
- ☐ Joint accounts for shared expenses

4.2 Debts:

- ☐ Each party responsible for own debts
- ☐ Premarital debts stay separate
- ☐ Specific debts assigned



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4.3 Spousal Support:

☐ No change from the law ☐ Set amount / duration ☐ Limit support

☐ Waive support ☐ Not sure

A spousal support provision may not be enforceable in some states if the party against whom it is enforced was not represented by independent counsel when signing, or if the provision is unconscionable at the time enforcement is sought. A prenuptial agreement also cannot limit child support.

4.4 Death & Estate Planning:

☐ Waive rights to inherit from each other

☐ Provide a specific inheritance for the spouse

☐ Life insurance requirement

☐ Protect children from a prior relationship

☐ Coordinate with wills / trusts

4.5 Other terms you want included (pets, household expenses, sunset clause after X years): _____

PART 5 — TIMING, COUNSEL & VOLUNTARINESS

5.1 Date the draft was (or will be) given to the other party: _____

5.2 Does your fiancé(e) have their own lawyer? ☐ Yes ☐ No

If yes — name / phone: _____

If a party is unrepresented, some states require written advice to seek independent counsel, a written waiver of counsel, and a full written explanation of the terms and effects in a language that party understands.

5.3 Does either party need an interpreter or translated documents? ☐ Yes ☐ No

5.4 Any pressure, rush, or ultimatum about signing? ☐ Yes ☐ No

If yes, explain: _____

5.5 Have wedding arrangements already been paid for or announced? ☐ Yes ☐ No

PART 6 — DOCUMENT CHECKLIST

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

☐ Draft agreement (if any)

☐ Tax returns (last 3 years)

☐ Pay stubs / income records

☐ Bank & investment statements

☐ Retirement account statements

☐ Deeds & mortgage statements

☐ Business documents & valuations

☐ Debt statements

☐ Inheritance / trust documents

☐ Existing wills / trusts



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Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge, and that I am seeking this agreement voluntarily. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of preparing or reviewing a prenuptial 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.