



Case Intake Form

Clients Name: \_\_\_\_\_ Position in Case: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Date of Marriage \_\_\_\_\_ Date of Filing/Separation \_\_\_\_\_

How many children of the marriage \_\_\_\_\_

Has a complaint been filed?      No      Yes (If yes, what date) \_\_\_\_\_

What date will be used to value assets? \_\_\_\_\_

**Services to be provided:** (Select all that apply)

Statement of Net Worth

Executive Compensation Analysis (RSU's, Stock Options, etc.)

Equitable Distribution

Dissipation Analysis – How far back \_\_\_\_\_

Pension Valuation

Asset Valuation – How far back \_\_\_\_\_

Forensic Analysis

Asset Description: \_\_\_\_\_

QDRO Drafting QTY: \_\_\_\_\_

Income Analysis – How far back \_\_\_\_\_

Settlement Analysis

Lifestyle Analysis – How far back \_\_\_\_\_

Maintenance Buy Out Calculations

Separate Property Analysis

Stipulation Language

Discovery Management:      Basic      Professional

Case Concerns / Goals \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date needed by: \_\_\_\_\_

Court Appearance Date: \_\_\_\_\_

Who is the point of contact for information: \_\_\_\_\_