



Main Line Family Law Center | P.O. Box 21 | Havertown, PA 19083

## Marital Inventory Survey

Please complete this form and **return no later than 2 business days** of your consultation. Email to: [info@mlfamilylawcenter.com](mailto:info@mlfamilylawcenter.com), or mail to: Main Line Family Law Center, P.O. Box 21, Havertown, PA 19083

### **I. GENERAL INFORMATION**

Date Date of Marriage

Married in County (state)

Would you like to receive email updates on issues and events surrounding divorce, custody that may be of interest?

How did you originally find us?

Referred By:

### **HUSBAND**

#### **Background Information**

Salutation First Name Last Name  
Date of Birth Age Highest Level of Education Completed  
Work Phone Home Phone Mobile Email  
Preferred method of contact

#### **Primary Address**

Street  
City State Zip

#### **Employment**

Employer Job Title Full-time or Part-time  
Annual Gross Salary Length of Employment years Health Benefits?

#### **Prior Child Support Obligations?**



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### WIFE

#### Background Information

Salutation	First Name	Last Name	
Date of Birth	Age	Highest Level of Education Completed	
Work Phone	Home Phone	Mobile	Email
Preferred method of contact			

#### Primary Address

Street		
City	State	Zip

#### Employment

Employer	Job Title	Full-time or Part-time	
Annual Gross Salary	Length of Employment	years	Health Benefits?

#### Prior Child Support Obligations?

### CHILDREN

	Name	Age	Date of Birth
Child 1			
Child 2			
Child 3			
Child 4			

## II. STATEMENT OF ASSETS

### REAL ESTATE

#### Primary Residence

Address

City

State

Zip

Title

Market Value (Approx.)

Owned before Marriage?

#### Second Residence/Vacation/Timeshare

Address

City

State

Zip

Title

Market Value (Approx.)

Owned before Marriage?

#### Investment/Business Real Estate

Address

City

State

Zip

Title

Market Value (Approx.)

Owned before Marriage?

#### Vacant Land

Address

City

State

Zip

Title

Market Value (Approx.)

Owned before Marriage?

### Personal Property

Furnishings

Estimated Value

Collectibles (i.e. jewelry, antiques, art)

Estimated Value

Other Contents

Estimated Value

## Marital Inventory Survey

### Bank Accounts (checking, savings, CD's, money markets)

Account Type	Title	Balance	Owned before Marriage?
1.			
2.			
3.			

### Stocks and Bond Investments

Name of Fund	Title	Value	Owned before Marriage?
1.			
2.			
3.			

### Vehicles (cars, boats, trailers)

Make/Model	Title	Value	Owned before Marriage?
1.			
2.			
3.			

### Lawsuit Claims

Are you a plaintiff (s) on any pending lawsuit for money damages?

If yes, please explain:

### Loan Payments

Are you a creditor on any loans, or verbal promises to repay a loan?

If so, please explain:

Amount Balance

## III. RETIREMENT

### Defined Benefit Company Pension

Name of Fund	Title	Value	Owned before Marriage?
1.			
2.			

### Defined Contributions (401K, 403(b), 457's, TIAA-CREF, Thrift Savings)

Name of Fund	Title	Value	Owned before Marriage?
1.			
2.			
3.			

## Marital Inventory Survey

### IRAs, (Traditional or Roth) SEP-IRAs

Name of Fund	Title	Value	Owned before Marriage?
1.			
2.			
3.			

### Employer Stock Options

Title	# of Grants, Grant date	Estimated Value
1.		
2.		

## IV. BUSINESS INTERESTS

Business Name	Name of Owner	Estimated Value	Business Type
% Ownership ( # of shares)		Owned before Marriage?	

## V. STATEMENT OF LIABILITIES

### Mortgage(s)

Name of Institution	Title	Balance	Owned before Marriage?
1.			
2.			
3.			

### Home Equity Loans/Lines of Credit

Name of Institution	Title	Balance	Owned before Marriage?
1.			
2.			
3.			

### Motor Vehicle Loans

Name of Institution	Title	Balance	Owned before Marriage?
1.			
2.			
3.			



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### Student Loans

	Name of Institution	Title	Balance	Owned before Marriage?
1.				
2.				
3.				

### Private

	Name of Institution	Title	Balance	Owned before Marriage?
1.				
2.				

### Lawsuit Claims

Are you a defendant on any pending lawsuit for money damages?  
If yes, please explain:

### Children's Accounts (checking, savings, CD's, money markets)

	Institution Name	Account Type	Custodian Name	Balance
1.				
2.				
3.				
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