

Financial Information (Client)

Properties owned throughout the marriage

| | |
|-----------------------------|-------|
| Address | _____ |
| Who owns it | _____ |
| When purchased | _____ |
| Purchase cost | _____ |
| Value now (if still own it) | _____ |
| Mortgage outstanding | _____ |
| Type of mortgage | _____ |
| Mortgage company | _____ |
| Who pays the mortgage | _____ |
| Who lives in it | _____ |
| Sell it or keep it | _____ |

Policies

| | |
|-------------------|-------|
| Type of policy | _____ |
| Insurance Company | _____ |
| Policy number | _____ |
| Who is insured | _____ |
| Current value | _____ |
| Maturity value | _____ |
| Date of Maturity | _____ |

Savings

| | |
|-------------------------------|-------|
| Shares | _____ |
| Premium Bonds | _____ |
| Investment Bonds | _____ |
| National Savings Certificates | _____ |

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Unit Trusts _____
Investment Trusts _____
ISA's _____
PEP's _____
TESSA's _____
Sharesave schemes _____

Pensions

Name of Scheme/Policy _____
Number _____
Type _____
Retirement Date _____
Current Value of fund _____
Value of lump sum payable on death before retirement _____
Value of lump sum payable on death after retirement _____
Value of lump sum payable upon leaving scheme before retirement _____
Value of lump sum payable upon retirement _____
Monthly pension payable _____
Widow's /Dependant's pension _____

Business Interests

Name of business _____
Address of business _____
Type of business – Company or sole trader etc _____
Type of business carried out _____
Value of business _____
Any CGT payable if business sold _____

Bank Accounts

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Name of bank and branch _____
Type of account _____
Account holders names _____
Current balance _____

Income

Earned Income from work _____
Gross _____
Net _____
Other benefits _____
Self employed income _____
Annual net profit _____
Share to you % _____
Tax paid _____
Benefit Income _____
Type of benefit _____
Amount of benefit _____
Investment income _____
Dividends from shares _____
Interest on bank accounts _____

Liabilities

Credit cards _____
Store Cards _____
Bank Loans _____
Other Loans _____
Hire Purchase Agreements _____
Family 'loans' _____