

**1. FIRM DETAILS**

Name of Firm

Best point of contact (Lawyer name)

Lawyer email

Telephone no.

**2. DETAILS OF THE PARTIES**

Client Name

Counsel retained by your firm

Mediator (If appointed)

Judge (If appointed)

Any retained experts

**3. OPPONENT DETAILS**

Name of Opponent

Law firm retained by other party

Lawyer retained by other party

Counsel retained by other party

**4. CASE DETAILS**

Approx. size of Asset Pool

Approx. value of the Claim

Expected range of legal costs and expenses to run the matter

Low	
Medium	
High	

Expected range of time to complete the matter

Low	
Medium	
High	

Details of the relationship:

Does the couple have children?

#### 4. NON-FINANCIAL INFORMATION

Please detail non-financial contributions made by the parties during the relationship in terms of contributions as home maker and parent, any renovation works undertaken, chores and responsibilities/roles within the relationship.

Type	Client	Other Party
Contributions		
Any renovation work undertaken		
Chores		
Responsibilities		
Other		

### 5. Financial Information

Is some of the asset pool liquid (cash)?

--

Initial financial contributions and financial positions of the parties:

- *respective assets and liabilities at the time of commencing the relationship;*
- *employment status and living arrangements at that time;*
- *how respective incomes were applied.*

Type	Client	Other Party
Real estate		
Motor vehicle		
Bank Account		
Investments <i>(including superannuation shares, etc)</i>		
Income		
Other		
Liabilities <i>(Credit card debt, mortgage loans etc.)</i>		

Financial contributions made by both parties throughout the relationship, including any gifts received, windfalls or inheritances.

Type	Client	Other Party
Financial contributions		
Gifts, windfalls or inheritance		
Other		

Details of all of the current assets and liabilities.

Assets	Client	Other Party
Income		
Real estate		
Motor Vehicle		
Household Items		
Bank Accounts		
Interests in any business		
Investments inc. shares		
Life Insurance Policy		
Interests in other property		
Interests in any trusts or financial resources <i>(including expectation of receiving money from personal injury claims or decreased estate)</i>		

Liabilities	Client	Other Party
Mortgages		
Credit Cards		
Vehicle Loans		
Other Loans		
Income tax liabilities		
Other liabilities		

Superannuation		
	Client	Other Party
Name of Superannuation Plan		
Type of Interest		
Value		

## 6. Further information

Instructions with respect to the party's future needs and in particular, ages, health, employment status, living expenses, current living arrangements, parenting duties etc.

Are there any previous agreements / property orders/ child support obligations?

## 7. Financial Documents

Please enclose all relevant financial disclosure material available that each side has a duty to disclose, including:

Financial Disclosure Material	Attached?
Client tax returns and notice of assessment for the past 3 financial years.	<input type="checkbox"/> Yes
Copy of bank account statements that you have an interest in for the past 12 months.	<input type="checkbox"/> Yes
Copies of all credit card statements that you have an interest in for the past 12 months.	<input type="checkbox"/> Yes
Copies of all mortgage account and/or loan account statements that you have an interest in for the past 12 months.	<input type="checkbox"/> Yes
In the event you have any interest in a corporation, trust or partnership, financial statements for the past 3 financial years.	<input type="checkbox"/> Yes
In the event you have an interest in a trust, the trust deed.	<input type="checkbox"/> Yes
If you are in receipt of any wage or salary payments, your 3 most recent pay slips.	<input type="checkbox"/> Yes
Superannuation statements for the past 3 years.	<input type="checkbox"/> Yes
Details of any shares or investments that you have, together with any current shareholding statements.	<input type="checkbox"/> Yes
Details of any other assets/liabilities.	<input type="checkbox"/> Yes