

Crellins Carter | SOLICITORS

Name:
Your Solicitor is:
Your appointment is on:

Please complete this Questionnaire and return it to your Solicitor before the meeting, if possible. We are happy to receive it by fax or e-mail if this assists.

We will also require you to bring with you to the appointment a valid passport or modern photo driving licence to verify your identity and two recent utility bills (this is a requirement of the Solicitors Regulation Authority and current legislation requires us to do this).

FINANCIAL PROVISION FOR CHILDREN

Full Name:.....

Address:.....

Correspondence Address (if different to above):

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Home Tel:..... Work Tel:..... Mobile Tel:.....

E-Mail: Fax Number:

Occupation:

Date of Birth:

Partner's Full Name:

Partner's Address:

Partner's Home Tel: Work Tel:

Partner's E-Mail: Fax Number:

Partner's Occupation:

Spouse's/Partner's Date of Birth:

Date relationship started & periods of cohabitation:

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Date of Separation:.....

Full Names and Dates of Birth of Children:

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Names and Addresses of Schools:

(please state whether state or independent schools and level of fees):

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Detail any health problems suffered by you, your partner or your children:

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Details of any previous court proceedings:

If possible, attach copy documentation, in particular any Orders made.

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Please indicate how you learnt of Crellins Carter and instructed us

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FINANCIAL INFORMATION

Your approximate monthly salary:(Net/Gross)

Any other income received by you:

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Do you own a property: YES/NO

If yes, what do you think is its current value?.....

Is the property mortgaged: YES/NO

If yes, what is the Building Society/lending institution name and account number?

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What type of mortgage is it: PAYMENT/ENDOWMENT/PENSION

What is the monthly repayment?

What is the capital sum outstanding?

In the event of an endowment mortgage, please give details of the endowment policy and the current surrender value if known:

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Please give details of any life policies (term insurance or endowment policies) held in your sole name giving a surrender value if possible:

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Please provide as much information as possible in relation to any pensions that you have:.....

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Please give as much information as possible regarding your assets, including bank/building society accounts, PEPs, ISAs, share portfolio, Invest Bonds, Premium Bonds, etc. and their approximate balances/worth:

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What debts do you have – please list giving details:

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YOUR PARTNER'S FINANCIAL INFORMATION (IF KNOWN)

Partner's monthly salary:(Net/Gross)

Any other income received by your partner.....

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Does your partner own a property? YES/NO

If yes, what do you think is its current value?

Is the property mortgaged: YES/NO

If yes, what is the name of Building Society/lending institution and account number:

.....

What type of mortgage is it: PAYMENT/ENDOWMENT/PENSION

What is the monthly repayment?

What is the capital sum outstanding?

In the event of an endowment mortgage, please give details of the endowment policy and the current surrender value if known:

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Please give details of any life policies (term insurance or endowment policies) held in your partner's name giving a surrender value if possible:

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Please provide as much information as possible in relation to any pensions that your partner has:

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Please give as much information as possible regarding your partner's assets, including bank/building society accounts, PEPs, ISAs, share portfolio, Invest Bonds, Premium Bonds, etc. and their approximate balances/worth:

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What debts does your partner have – please list giving details:

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PLEASE USE THIS SECTION TO GIVE GENERAL INFORMATION CONCERNING YOUR CASE

History of the relationship:

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Details of financial contribution to the relationship:

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Please confirm the level of contact with your children that currently/historically has taken place:

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Any other relevant factors.

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QUESTIONS AND ADVICE SOUGHT

Please list any particular questions/concerns you wish to raise and discuss when you meet with us.

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6.

Please visit our website at www.crellinscarter.co.uk

