Griswold Law Firm



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**Texas Postnuptial Agreement Intake Form**

Please complete the following information as accurately and thoroughly as possible. All information is confidential and will be used solely to evaluate and draft your postnuptial agreement.

# Type of Agreement Sought

☐ General Postmarital Agreement
☐ Partition or Exchange Agreement
☐ Agreement to Convert Separate to Community Property
☐ Separation Agreement (non-divorce)
☐ Other: \_\_\_\_\_\_\_\_\_\_\_

1. **Reviewing Or Drafting?**

Would you like the Attorney to draft an initial agreement or review one that has already been drafted?

☐ Draft initial Postmarital Agreement

☐ Review a Pre-drafted Agreement

☐ Review and Propose Revisions to an Agreement

# Contact Information

Client Name:

Phone Number:

Email Address:

Preferred Method of Contact: ☐ Phone ☐ Email

# Spouse’s Information

Full Name of Spouse

Spouse’s Attorney (if any):

Attorney Contact Info (if applicable):

# Representation Confirmation

**Purpose of the Agreement (Check all that apply):**

☐ Clarify or reclassify existing separate/community property

☐ Convert separate property to community property

☐ Partition or exchange jointly owned property

☐ Establish terms for future separation

☐ Other: \_\_\_\_\_\_\_\_\_\_\_

1. **Add Spousal Consent Verification**

# Does your spouse know you are seeking this agreement?

# ☐ Yes☐ No☐ Not yet — seeking advice first

1. **Disclosure Intention**

Do you intend to exchange full financial disclosures with your spouse?

☐ Yes, we’ve already exchanged disclosures
☐ Yes, we plan to do so
☐ No, we do not plan to exchange disclosures
☐ Unsure — seeking advice on this

# Property & Financial Information

**Specific Circumstances**

1. **Marital Residence**

 Do you and your spouse currently share a home?

☐ Yes ☐ No

If yes, address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is this residence community property or separate? ☐ Community ☐ Separate ☐ Not Sure

1. **Do either of you expect to receive a significant inheritance or gift?**

☐ Yes ☐ No ☐ Already received

If yes, please explain: \_\_\_\_\_\_\_\_\_\_\_

**General Property Circumstances**

Please provide a brief description of your current financial situation. Attach separate schedules as needed.

**When listing assets, please indicate when and how each item was acquired (e.g., before marriage, during marriage with separate funds, with community funds, as a gift/inheritance, or unknown/mixed). This helps determine legal classification.**

For example:

* Before marriage
* During marriage using separate funds
* During marriage using community funds
* Gifted or inherited
* Don’t know / mixed
1. **Real Property –** (Include all real estate owned, including addresses, character, and estimated values):

|  |  |  |  |
| --- | --- | --- | --- |
| **Property** | **Character / How Title Held** | E**stimated Value** | **Intended Outcome** |
| Ex. 123 Main St, Austin, TX | Joint | $450 | Spouse A keeps, Spouse B waives |
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1. Bank Accounts (Include account types, balances, and ownership—individual or joint):

**Name of Institution and Account No (last four**) **Est. Amount held**

1. Investments (Stocks, bonds, retirement accounts, etc.):

**Name of Institution and Account No (last four**) **Est. Amount held**

1. Business Interests (Name, entity type, ownership percentage, valuation):

 **Name & Entity Type, Character (Comm or Sep) Ownership Percentage Valuation**

1. Debts and Liabilities (Mortgages, loans, credit cards):

 **Name (institution or person to whom owed); Type: Estimated Debt:**

# Specific Terms or Protections You’d Like Included

Are there specific terms you’d like to include in the agreement? (e.g., “Each keeps their own retirement,” “One party keeps the house,” “No community debt liability,” etc.)

#  Additional Notes

Please describe any special circumstances, concerns, or goals you have regarding this postnuptial agreement. If you are reviewing a proposed agreement, are there any terms or sections you find concerning, confusing, or potentially unfair?

#  11. Supporting Documents

Please attach any relevant documents, including:

• Prior drafts of any prenuptial or other postnuptial agreement
• Financial disclosures from either party
• Lists of assets and debts
• Related communications (optional)

# Signature & Acknowledgment

I affirm that the information provided above is accurate to the best of my knowledge and understand that providing complete and truthful information is essential to the legal drafting process.

Client Signature:

Date:

Thank you for completing this intake form. We will review the information and follow up with you to schedule a consultation.