

CATHY DAIGLE, LLC

FINANCIAL DIVORCE CONSULTING



COLLABORATIVE
PRACTICE
Resolving Disputes Respectfully

Assisting Families in Transition

Dear Prospective Client:

Thank you for contacting me inquiring about services for Financial Planning in Divorce.

In order to make our initial meeting most efficient, please complete and bring the following:

1. Family Information sheet – provided below. This is a fill-in form and provides necessary information for our records and is used when completing the Income and Expense Declaration (FL-150).
2. Information Checklist – used for providing the documents in conjunction with the Schedule of Assets and Debts (FL-142). The checklist is provided to help streamline the data gathering process in order to save our time and your money.
3. Estimated Living Expenses – provide one form for each spouse. To help keep your costs down, you may wish to download and provide us with a soft copy of the excel worksheet located in this Initial Meeting section.
4. Optional: to view the actual Santa Clara County judicial forms, please go to the county court site. From the list, you will see Forms FL-142 and FL-150 which corresponds with our checklist.

I look forward to meeting with you. Please feel free to call me if you have questions.

Sincerely,

Cathy

Cathy L. Daigle, CFP®, CDFA®

FAMILY INFORMATION

Name:		Name:	
Address:		Address:	
Phone #s: home		Phone #s: home	
cell		cell	
work		work	
E-mail:		E-mail:	
Date of Birth (DOB):		Date of Birth (DOB):	
U.S. Citizen? (if not, Country?)		U.S. Citizen? (if not, Country?)	
Employer(s):		Employer(s):	
Employer Address:		Employer Address:	
Date job started:		Date job started:	
Occupation:		Occupation:	
# of hours worked per week:		# of hours worked per week:	
Gross Annual Income:		Gross Annual Income:	
If unemployed, date job ended, most recent employer info/salary:		If unemployed, date job ended, most recent employer info/salary:	
Date of Marriage:		Petitioner:	
Date of Separation:		Respondent:	
Date of Service:		Case #	
Completed high school or equivalent?		Completed high school or equivalent?	
If no, highest grade completed:		If no, highest grade completed:	
# of yrs college completed:	Degree(s) obtained:	# of yrs college completed:	Degree(s) obtained:
# of yrs graduate school:	Degree(s) obtained:	# of yrs graduate school:	Degree(s) obtained:
Prof'l/occupat'l license(s)(specify):		Prof'l/occupat'l license(s)(specify):	
Vocational training (specify):		Vocational training (specify):	
CHILDREN (include adult children):			
Name:	DOB:	Timeshare w/child (%):	
Name:	DOB:	Timeshare w/child (%):	
Name:	DOB:	Timeshare w/child (%):	
Children's Health Care Insurance provider: company & address:		Do adult children, parents, etc., live with you? If so, provide name(s): _____, their monthly income: \$____; do they support household exps? yes___ or no___	
Attorney:		Attorney:	
Coach:		Coach:	
Neutral Financial Specialist:		Neutral Child Specialist:	