

Married couple – financial settlement questionnaire

This questionnaire helps us collect information from you relating to your personal and financial circumstances to assist us in advising you on your options.

By submitting your email address and telephone number to us you consent to us contacting you to deal with your enquiry. Calls may be recorded for training and monitoring purposes. For more information on our privacy notice, [please click here](#).

A divorce legally ends a marriage, and a dissolution legally ends a civil partnership. Reference throughout this questionnaire to divorce or marriage will equally apply to dissolution or a civil partnership unless stated otherwise. If you would also like advice on making an application for a divorce or dissolution, please also complete our [Divorce & Dissolution Questionnaire](#).

Please refer to yourself throughout this questionnaire as Party 1.

Please do not send us any documents relating to your personal or financial circumstances or relating to Party 2 unless requested to do so. Only provide information in this questionnaire relating to Party 2 so far as is known to you. Do not copy or take any documents or records belonging to Party 2.

If you are not able to answer all the questions, please don't worry.

About you

	Party 1	Party 2
Title		
First name(s)		
Middle name(s)		
Surname		
Gender		
Date of birth		
Home address (including postcode)		
Telephone number(s)		
Email		

About your marriage/civil partnership

Date of marriage/civil partnership			
Did you cohabit prior to marriage?	Yes	No	
If you cohabited prior to marriage, please confirm the date cohabitation commenced			
Date of separation (if applicable)			
Are there any existing or previous court proceedings relating to your marriage, your property, or any children?	Yes	No	
If yes, please provide details including the court case number, if known			
Have you previously entered into a pre or post-nuptial agreement or deed of separation?	Yes	No	

Domicile and residence

Habitual residence is the place (meaning country) in which your life is mainly based. This may be the place where you work, own property, your children go to school and where your main family life takes place. It is the place where you are settled and intend to stay settled.

Domicile is the country you treat as your main permanent home in which you live, or to which you intend to return. When you were born you will have acquired your parents' domicile. If you have since moved to another country and made that your permanent home, then your domicile may have moved there.

If you were born in England or Wales, lived your entire life here, and intend to stay here, then it is very likely that you'll be both habitually resident and domiciled here.

	Party 1		Party 2	
Is your habitual residence in England/Wales? If no, please confirm where you are resident	Yes	No	Yes	No
	Place of residence		Place of residence	

Are you domiciled in England/Wales? If no, please confirm country of domicile	Yes	No	Yes	No
	Country of domicile		Country of domicile	
Are you resident outside of England/Wales for tax purposes?	Yes	No	Yes	No
Do you have plans to live outside of England and Wales?	Yes	No	Yes	No
Will you need advice on your financial settlement being relied upon in any other jurisdiction and if so, where?	Yes	No	Yes	No
	Jurisdiction		Jurisdiction	

Other relationships

	Party 1			Party 2		
Have you or your spouse previously been married and is there an existing order in place?	Yes	No		Yes	No	
If yes please provide details						
Are you in a cohabiting relationship with a new partner or intend to cohabit?	Yes	No		Yes	No	
If yes please provide details						
Do you have an intention to remarry?	Yes	No	Unsure	Yes	No	Unsure
If yes please provide details						

Health

	Party 1			Party 2		
Are there any health issues we should know about?	Yes	No	Unsure	Yes	No	Unsure
If there are any health issues, please provide details						

About your family

Children of both parties

Please use this section to provide information about your children who are under the age of 18 or still financially dependent on you. If you are not both the biological parents of the children please confirm details, for example adopted children or stepchildren.

Please include details of any financial provision being paid or due to be paid (for example school, nurse, or college fees) and any arrangements in place for the payment of child maintenance and the amount and frequency of the payment (per month, per week or per annum) and whether this is a voluntary arrangement, following a Child Maintenance Service assessment or under the terms of a court order.

If you need extra space when answering any of the questions, please use the additional information box at the end of this section.

Full Name	DOB	Child of Party 1 or 2	With whom does the child live	School/nursery/college name and address	Please confirm if any financial provision or maintenance is being paid and if so the amount. If school/nursery are fee paying, please confirm the fees per year and who pays them

Children from previous relationships

Please use this section to provide information about children from previous relationships who are under the age of 18 or still financially dependent on you. If you are not the biological parents of the children please confirm details, for example adopted children or stepchildren.

Please include details of any financial provision being paid or due to be paid (for example school, nurse, or college fees) and any arrangements in place for the payment of child maintenance and the amount and frequency of the payment (per month, per week or per annum) and whether this is a voluntary arrangement, following a Child Maintenance Service assessment or under the terms of a court order.

If you need extra space when answering any of the questions, please use the additional information box at the end of this section.

Full Name	DOB	Child of Party 1 or 2	With whom does the child live	School/nursery/college name and address	Please confirm if any financial provision or maintenance is being paid and if so the amount. If school/nursery are fee paying, please confirm the fees per year and who pays them

Care arrangements for your children

Do any of the children listed above have any health issues, disabilities, or special educational needs?	Yes	No	
If so, please provide details			
Are there any safeguarding of welfare concerns regarding your children?	Yes	No	Unsure
If so, please provide details			
Please provide a summary of the current care arrangements (for example how many nights do you have your children to stay overnight each week). Please also let us know if you want to change the arrangements and if so what to.			

Any other individual who lives with you or is financially maintained by either of you

Please use this section to provide information about any other individuals who rely upon you financially (for example relatives who may live with you).

Full Name	DOB	Address	Dependent of Party 1 or Party 2	Details of financial provision being made

Additional information about your family life

Income

	Party 1			Party 2		
Occupation						
Please confirm if you are employed or self employed						
Earned or self-employment income	Gross £			Gross £		
	Per annum			Per annum		
Please provide details of any bonuses or other occasional payments						
Please provide details of income from any other sources (investments, state benefits, etc)						
Please confirm if there are any likely changes to your income position	Yes	No	Unsure	Yes	No	Unsure
If there are likely to be any changes, please provide details						

Property

There are two aspects to the ownership of property; the legal title to property and the beneficial interests in it (the right to receive the profits or income from a property or the right to live in it). Both may be vested in the same people, but this is not always the case.

If you own a property together, you may have a declaration of trust (also known as a deed of trust) in place from the time of purchase or subsequently entered into one. A declaration of trust is a legal document in which the legal owners of the property declare that they hold the property on trust for the beneficial owners and it sets out the shares in which the beneficial interests are held.

At the time of buying the property your conveyancer would have given you the choice of holding the beneficial interests in the property as joint tenants or tenants in common (either in equal or unequal shares). If you are unsure whether there is a declaration of trust in place or whether you are joint tenants or tenants in common don't worry.

If you need extra space when answering any of the questions below, please use the additional information box at the end of this section.

Family Home

Please confirm the address of the family home if different to the address at the start of this questionnaire			
How is the property owned?			
Joint names with spouse	Joint names with someone other than spouse	Sole name	
If owned in sole or joint names with someone else, please confirm in whose name the property is registered and set out as far as is known to you what their beneficial interests are			
Please complete the box below if you know how the beneficial interests are held in the property. Please tick 'not known' if you are not sure			
Joint tenants	Tenants in common in equal shares	Tenants in common in unequal shares	Not known
Is there a declaration or deed of trust from the time of purchase or subsequently one that has been entered into?			
Yes	No	Unsure	
Please complete the box below if you know how the beneficial interests are held in the property. Please tick 'not known' if you are not sure			
If there is a declaration of trust, please confirm so far as is known to you what it says about the beneficial ownership of the property			
Current value			
£	Estimate	Formal valuation undertaken	
If a formal valuation has been undertaken, please confirm the date and who by			
If there is a mortgage, please confirm name of mortgage company			

If there is a mortgage, please confirm the type of mortgage (if known)	Repayment (repayment and interest payable each month)	Interest only (the balance on the mortgage doesn't reduce- only interest is paid)
If there is a mortgage the approximate outstanding balance or if you have obtained a redemption figure, please confirm the amount and the date of the redemption statement		
If there is an early redemption penalty on the mortgage, please confirm the amount and the date when they will no longer apply		
If there are any other secured loans against the property, please provide details of the amount owed		

Other properties

Are there any other properties in which you have a legal or beneficial interest?		
Yes	No	Unsure

If you answered yes to the previous question please fill out the below

Please confirm the address of the property you hold a legal or beneficial interest in			
How is the property owned?			
Joint names with spouse	Joint names with someone other than spouse	Sole name	
If owned in sole or joint names with someone else, please confirm in whose name the property is registered and set out as far as is known to you what their beneficial interests are			
Please complete the box below if you know how the beneficial interests are held in the property. Please tick 'not known' if you are not sure			
Joint tenants	Tenants in common in equal shares	Tenants in common in unequal shares	Not known
Is there a declaration or deed of trust from the time of purchase or subsequently one that has been entered into?			
Yes	No	Unsure	
Please complete the box below if you know how the beneficial interests are held in the property. Please tick 'not known' if you are not sure			
If there is a declaration of trust, please confirm so far as is known to you what it says about the beneficial ownership of the property			
Current value			
£	Estimate	Formal valuation undertaken	
If a formal valuation has been undertaken, please confirm the date and who by			
If there is a mortgage, please confirm name of mortgage company			

<p>If there is a mortgage, please confirm the type of mortgage (if known)</p>	<p>Repayment (repayment and interest payable each month)</p>	<p>Interest only (the balance on the mortgage doesn't reduce- only interest is paid)</p>
<p>If there is a mortgage the approximate outstanding balance or if you have obtained a redemption figure, please confirm the amount and the date of the redemption statement</p>		
<p>If there is an early redemption penalty on the mortgage, please confirm the amount and the date when they will no longer apply</p>		
<p>If there are any other secured loans against the property, please provide details of the amount owed</p>		

Please use this box to provide any additional information about your property interests

Capital

Please complete the table below confirming if property is jointly owned and provide an estimate of the value.

Please do not include pensions in the table below. There is a separate section for you to provide details of any pensions.

If you need extra space when answering any of the questions below, please use the additional information box at the end of this section.

	Joint £	Party 1 £	Party 2 £
Bank accounts – current			
Bank accounts – savings			
Other capital. For example, ISAs, PEPs, national savings investments, bonds, stocks, unit trusts, investment trusts, guilds, shares (do not include dividend income as this should be included above)			
Cryptocurrency			
Insurance policies - please confirm whether payable on death only or whether the policy has a surrender value			
Cash held in excess of £500 and if so where is it held			

Personal belongings for example cars, collections, pictures, and jewellery individually worth more than £500			
If income or capital is received from a trust or you are a beneficiary under a trust, please provide details			
Foreign assets			
Details of any money owed to you (do not include sums owed in directors or partnership accounts)			
Additional information:			

Future financial resources

Are there any future financial resources to take into account?	Yes	No	Unsure
If so, please provide details			

Liabilities

Please complete the table below confirming if liabilities (debts) are joint or sole responsibility. If liabilities are in a sole name but you believe responsibility for repayment should be shared, please provide details in the additional information box below.

Please do not include mortgages or secured loans in the table below. These should be included in the property section above.

	Joint £	Party 1 £	Party 2 £
Bank overdraft			
Credit cards			
Personal loans			
H.P.			
Friends/family			
Additional information:			

Business interests

Name of business		
Nature of business		
Extent of interest		
Sole trader	Partner in a partnership with others	Shareholder in a limited company
When will the next set of accounts be available		
Sums owed by the business by way of a director's loan account, partnership capital or current accounts		
Estimate of current value of interest		
If figures in last accounts not accurate, why?		
Additional information		
Are there other businesses in which you have an interest?		
Yes	No	Unsure

If you answered yes to the previous question please fill out the below

Name of business		
Nature of business		
Extent of interest		
Sole trader	Partner in a partnership with others	Shareholder in a limited company
When will the next set of accounts be available		
Sums owed by the business by way of a director's loan account, partnership capital or current accounts		
Estimate of current value of interest		
If figures in last accounts not accurate, why?		
Additional information		

Pensions

	Party 1			Party 2		
Type						
Dates of membership (if known)						
CETV if known						
Date of CETV						
Is the pension in payment?	Yes	No	Unsure	Yes	No	Unsure
Have there been any drawdowns?	Yes	No	Unsure	Yes	No	Unsure
If any drawdowns, please provide details of the amount(s) and how the funds have been used						
Are there any other pensions in which you have an interest?	Yes	No	Unsure	Yes	No	Unsure

If you answered yes to the previous question please fill out the below

	Party 1			Party 2		
Type						
Dates of membership (if known)						
CETV if known						
Date of CETV						
Is the pension in payment?	Yes	No	Unsure	Yes	No	Unsure
Have there been any drawdowns?	Yes	No	Unsure	Yes	No	Unsure
If any drawdowns, please provide details of the amount(s) and how the funds have been used						
Are there any other pensions in which you have an interest?	Yes	No	Unsure	Yes	No	Unsure

Tax

	Party 1			Party 2		
Do you or Party 1 have any tax liabilities?	Yes	No	Unsure	Yes	No	Unsure
If yes, please provide details						

Contributions

	Party 1			Party 2		
Are there financial or non-financial contributions you think are relevant?	Yes	No	Unsure	Yes	No	Unsure
If yes, please provide details						

Other information

Are there any other directorships not referred to in the business interests section?	Yes	No	Unsure
If so, please provide details			
Is there any bad behaviour or conduct you think is relevant to the financial settlement?	Yes	No	Unsure
If so, please provide details			
Have there been any significant changes in your assets or income during the last 12 months?	Yes	No	Unsure
If so, please provide details			
Are there any significant changes in assets or income likely to occur during the next 12 months?	Yes	No	Unsure
If so, please provide details			

Financial circumstances following remarriage or cohabitation

<p>If you are in a new cohabiting relationship or have remarried, please confirm so far as is known to you your partner's occupation and income from all sources</p>	
<p>If you are in a new cohabiting relationship or have remarried, please confirm so far as is known to you details of your partner's capital and any liabilities</p>	
<p>If party 2 is cohabiting or has remarried, please provide any details about their partner/spouse so far as is known to you</p>	

Wills and estate planning

We do not have a Will department, however, we do work closely with a trusted network of lawyers we can call upon to assist you, or we can work with your existing lawyers.

If you do not have a Will the law will dictate how your estate will pass, depending on its value and the family members you leave behind. These are known as the rules of intestacy. Without a Will part if not all your estate will pass to your spouse or civil partner.

If you have a Will, you should review it. Your Will is unaffected by your separation and any gifts in that Will to your spouse or civil partner will continue to take effect during the period up to your final order of divorce. If you no longer want your spouse to benefit from your estate, you will need to change your Will.

You may also want to review the nomination of benefits in the event you have any death in service or insurance policies in place.

Do you have an existing UK Will?	Yes	No	Unsure
Do you have any existing Powers of Attorney?	Yes	No	Unsure
Do you have an existing Will in a foreign jurisdiction?	Yes	No	Unsure
Do you require advice in relation to a Will and estate planning?	Yes	No	Unsure
Do you already have a lawyer instructed?	Yes	No	
If you do not have a lawyer instructed, would you like us to pass on your details to one of our trusted lawyers so that they can contact you directly?	Yes	No	Unsure

Additional information

Please use the box below to provide us with any additional information you think it would be helpful for us to know.

Next Steps

- Please tick to confirm you agree to WM Law Ltd trading as Watson Morris holding the information you provide about yourself in accordance with our privacy notice. For more information on our privacy notice, [please click here](#).
- Please tick to confirm your consent to us providing a copy of this form to one of our trusted will and estate planning lawyers to ask them to get in touch with you to quote for their services.

Thank you for taking the time to complete this form. Please now date the form and send it back to enquiries@watson-morris.co.uk

We will contact you once we have reviewed your form to discuss your requirements and the next steps.

Please note that if we do not receive your instructions to proceed with advice on a financial settlement on your behalf within 12 months of you completing this questionnaire, we will destroy all correspondence (including email correspondence) and documentation (including your completed questionnaire).

Dated	
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