

CONFIDENTIAL CLIENT QUESTIONNAIRE

Parenting Plans

Please complete this form as best as you can. The more information you can give me the better; the more time we will have to answer your questions and advise you on the law and the procedure, instead of asking you for information. On the other hand, if you do not know the precise information, give approximations and say it is approximate, or just leave parts blank if you do not know it now.

Please return the form to me before our meeting if possible. You can either save the file to your hard disk, complete it on screen and then save it and email it to me; or you can print it out and fill it in by hand and fax or post it to me. I am sorry the form is so long; the more information you can let me have on this form, the less time we will spend on this during our meeting.

Thank you.

You

Title Full name

Surname at birth

Date of birth

Age

Nationality/ies

If you are not a British Citizen, can you stay in the UK? Yes No I don't know

Have you always lived in England or Wales? Yes No

If not please state where you have lived and when

Home address (incl. Postcode)

Correspondence address (if different)

Email address

How often do you check your email?

Do you want me to communicate with you by email at this address? Yes – the account is confidential
 No

Telephone

Home

Work

Mobile

Do not call me at home

Fax

Do you want me to send you faxes to this number? Yes
 Yes but only if you ring before
 No

Occupation

Name of employers

Address

Your Partner

Title Full name
Surname at birth
Date of birth Age
Nationality/ies
If they are not a British Citizen, can they stay Yes No I don't know
in the UK?
Have they always lived in England or Wales? Yes No
If not please state where they have lived and
when
Home address (incl. Postcode)
Email address
How often do they check their email?
Telephone Home
Work
Mobile
Fax
Occupation
Name of employers
Address

Your Marriage/Civil Partnership/Relationship Details

When did you meet?
When did your relationship begin?
When did you start living together?
Are you married or civil partners? Yes No – Go to the next section
Date of the wedding/registration
Place of the wedding/registration
Any other relevant information in this area

Any other adults – Complete all relevant categories

Proposed Co-Parent(s)

Title Full name

Surname at birth

Date of birth

Age

Nationality/ies

If they are not living in the country of their nationality, do they have a right to live there?

Yes No I don't know

Visa status

Have they always lived in the country of current residence?

Yes No

If not please state where they have lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone

Home

Work

Mobile

Fax

Occupation

Name of employers

Address

Income

£

Assets

Debts

Relationship status

Married

Civil partnership or similar

Single

Cohabiting

How long have they been living together?

Date of the wedding/registration

Place of the wedding/registration

Their partner

Title Full name

Surname at birth

Date of birth

Age

Nationality/ies

If they are not living in the country of their nationality, do they have a right to live there?

Yes No I don't know

Visa status

Have they always lived in the country of current residence?

Yes No

If not please state where they have lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone

Home

Work

Mobile

Fax

Occupation

Name of employers

Address

Income

£

Assets

Debts

What is their planned role

Any other relevant information in this area

Proposed Egg Donor or Genetic Mother including if one of you

Known Known Not known

Agency (if any)

Title Full name

Surname at birth

Date of birth Age

Nationality/ies

If she is living elsewhere, does she have a Yes No I don't know

right to live there?

Visa status

Has she always lived in the country of current Yes No

residence?

If not please state where she has lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often does she check her email?

Telephone Home

Work

Mobile

Fax

Occupation

Name of employers

Address

Income £

Assets

Debts

Relationship status Married Civil partnership or similar

Single

Cohabiting

How long have they been living together?

Date of the wedding/registration

Place of the wedding/registration

Her partner

Title Full name

Surname at birth

Date of birth Age

Nationality/ies

If they are not living in the country of their Yes No I don't know

nationality, do they have a right to live there?

Visa status

Have they always lived in the country of Yes No

current residence?

If not please state where they have lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone Home

Work

Mobile

Fax

Occupation

Name of employers

Address

Income £

Assets

Debts

Any other relevant information in this area

Money paid to agency

Money paid to egg donor

Proposed Sperm Donor or Genetic Father including if one of you
Known Known Not known

Agency (if any)

Title Full name

Surname at birth

Date of birth Age

Nationality/ies

If he is not living there, does he have a right Yes No I don't know

to live there? Visa status

Has he always lived in the country of current Yes No

residence?

If not please state where he has lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone Home

Work

Mobile

Fax

Occupation

Name of employers

Address

Income £

Assets

Debts

Relationship status

Married

Civil partnership or similar

Single

Cohabiting

How long have they been living together?

Date of the wedding/registration

Place of the wedding/registration

His partner

Title Full name

Surname at birth

Date of birth Age

Nationality/ies

If they are not living in the country of their Yes No I don't know

nationality, do they have a right to live there? Visa status

Have they always lived in the country of Yes No

current residence?

If not please state where they have lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone Home

Work

Mobile

Fax

Occupation

Name of employers

Address

Income £

Assets

Debts

Any other relevant information in this area

Money paid to agency

Money paid to sperm donor

Proposed Surrogate

Agency (if any)

Title Full name

Surname at birth

Date of birth Age

Nationality/ies

If she is not living in the country of their Yes No I don't know

nationality, does she have a right to live there? Visa status

Has she always lived in the country of current residence? Yes No

If not please state where she has lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone Home
Work
Mobile

Fax

Occupation

Name of employers

Address

Income £

Assets

Debts

Relationship status Married Civil partnership or similar
 Single Cohabiting

How long have they been living together?

Date of the wedding/registration

Place of the wedding/registration

Her partner

Title Full name

Surname at birth

Date of birth Age

Nationality/ies

If they are not living in the country of their Yes No I don't know

nationality, do they have a right to live there? Visa status

Have they always lived in the country of current residence? Yes No

If not please state where they have lived and when

Home address (incl. Postcode)

Solicitor's details (if they have one)

Email address

How often do they check their email?

Telephone Home
Work
Mobile

Fax

Occupation

Name of employers

Address

Income £

Assets

Debts

Any other relevant information in this area

Money paid to agency

Money paid to surrogate

Children

First name & surname	Date of birth	Age	Sex	School or nursery	Parents (if biological and legal parents are different, give full details)
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	
			<input type="checkbox"/> Boy		you <input type="checkbox"/> other parent(s):
			<input type="checkbox"/> Girl	<input type="checkbox"/> Fees	

Has any child ever been involved with social services? If so please provide details No Yes:

Residence and Contact

Who do the children live with?
How much time do they spend with their parents or others regularly?

Maintenance

Does someone pay maintenance to someone else for any child? Yes I pay £ per for Yes pays £ per for No

If so, on what basis? We have agreed this level The Child Support Agency has made an assessment There is a court order (please bring a copy)

Disabilities

Do you, your partner or children have any disabilities or special needs? If so please provide details
If you decided on this way to parent because of fertility problems of one or both of you, please provide details here.
Fertility clinic used
Fees of fertility clinic

The Family Home

Address

In whose name is the property registered?

You Your (former) partner Joint

Local Authority (London Borough)

Type

flat terraced semi-detached detached

Number of bedrooms

Number of reception rooms

Is your home owned or rented

Rented Owned – Please continue below

Rented Home

Landlord

Date of tenancy

Type of tenancy

Assured shorthold Assured Secure

Other:

Do you have a right to buy?

Yes No

Rent

£ per

Who pays the rent at the moment?

You Your (former) partner Joint

Owned Home

Date of purchase

Original: purchase price

£

mortgage

£

mortgage lender

Contributions to purchase price/deposit

You

£

Your (former) partner

£

Have you carried out major improvements (new kitchen or bathroom, extensions, loft conversions? Who paid for it?

Who is paying the mortgage?

You Your (former) partner Joint

Monthly mortgage payments

£

Current: value

£

mortgage balance

£

mortgage lender

Any other loans secured on your home

Other Properties either of you owns

Address

In whose name is the property registered?

You Your (former) partner Joint

Local Authority (London Borough)

Type

flat terraced semi-detached detached

Number of bedrooms

Number of reception rooms

Date of purchase

Original: purchase price

£

mortgage

£

mortgage lender

Contributions to purchase price/deposit

You

£

Your (former) partner

£

Who is paying the mortgage?

You Your (former) partner Joint

Monthly mortgage payments

£

Current: value

£

mortgage balance

£

mortgage lender

Any other loans secured on your home

Type of mortgage

Repayment Interest only (Endowment)

If you have further properties, please provide the information for each property on a separate page. You can download further client questionnaire property pages from www.alternativefamilylaw.co.uk/en/about/instructions.htm.

Broad Picture of your Finances

Income and Assets

You

Annual gross income £

Monthly net income £

Assets (incl bank accounts, policies, properties etc.) together with current values

Debts including loans and credit cards (but not your mortgage set out above)

Occupational and Private Pensions
(if you have a valuation or policy document you can find, please bring it with you)

Your partner

Annual gross income £

Monthly net income £

Assets (incl bank accounts, policies, properties etc.) together with current values

Debts including loans and credit cards (but not your mortgage set out above)

Occupational and Private Pensions

Joint

Assets (incl bank accounts, policies, properties etc.) together with current values

Debts including loans and credit cards (but not your mortgage set out above)

Further details

Give very brief details of the reasons for your parenting plans

Have there been previous court proceedings relating to any children

Are you or is your former partner religious?

If so what religion or denomination?

Advice

Are there any other issues you would like to have advice on?

- Marriage
- Civil partnership
- Pre-nuptial or pre-registration agreement
- Possible financial claims
- Contact with children
- Where the children ought to live
- Immigration (we will refer you to a specialist)
- Other, please specify:

How did you hear of us?

Please email, post or fax the form back to:

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W: www.alternativefamilylaw.co.uk

Thank you!