



Family
Information
Form

BLAKE 
MORGAN

Client				
Name:	<input type="text"/>	DOB:	<input type="text"/>	
Address:	<input type="text"/>			
	May we write to you at this address?		Yes <input type="checkbox"/>	No <input type="checkbox"/>
Preferred phone number:	(1)	<input type="text"/>		
	(2)	<input type="text"/>		
Connections with other countries:	<input type="text"/>			
Preferred Email:	(1)	<input type="text"/>		
	(2)	<input type="text"/>		
Occupation:	<input type="text"/>			
Partner				
Name:	<input type="text"/>	DOB:	<input type="text"/>	
Address:	<input type="text"/>	Occupation:	<input type="text"/>	
Marriage				
Marriage Date:	<input type="text"/>			
Do you have your Marriage Certificate?	Yes <input type="checkbox"/>		No <input type="checkbox"/>	
Separation Date:	<input type="text"/>			
Length of cohabitation prior to marriage:	<input type="text"/>			
Do you have a Pre-Nuptial Agreement?	Yes <input type="checkbox"/>		No <input type="checkbox"/>	
	Client	Partner		
Relevant health concerns:	<input type="text"/>	<input type="text"/>		
Are you in a new relationship?	Yes <input type="checkbox"/>		No <input type="checkbox"/>	
Are you cohabiting?	Yes <input type="checkbox"/>		No <input type="checkbox"/>	
All Children				
Child 1				
Name:	<input type="text"/>			
Date of Birth:	<input type="text"/>	Gender:	<input type="text"/>	
Education:	<input type="text"/>			
Child 2				
Name:	<input type="text"/>			
Date of Birth:	<input type="text"/>	Gender:	<input type="text"/>	
Education:	<input type="text"/>			

Child 3

Name:

Date of Birth: Gender:

Education:

Client Financial

Employment Salary:

Other income (bonus / benefits):

Bank building society balance:

Investments:

Policies – life, etc (jt)

Pensions: (1)

(2)

Other:

Your Main Home

Address:

Value: Less mortgage amount: Net value:

Ownership:

Mortgage with:

Penalty? Who pays?

Other Properties

Address:

Value: Less mortgage amount: Net value:

Ownership:

Mortgage with:

Penalty? Tenanted?

Business Assets for both	
Name of and type of Business eg sole trader, partnership or limited company:	<input type="text"/>
Shareholders or partnership agreement in place?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Value of interest:	<input type="text"/>
Liabilities	
Bank overdraft:	<input type="text"/>
Credit Card debts:	<input type="text"/>
Other loans:	<input type="text"/>
Miscellaneous	
Joint Accounts?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Will and LPA?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Accountant / IFA?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Partner's Financials	
Employment Salary:	<input type="text"/>
Other Income (bonus / benefits):	<input type="text"/>
Bank account and building society:	<input type="text"/>
Liabilities:	<input type="text"/>
Stocks, shares and gilts / NS certificates:	<input type="text"/>
Policies – life, etc (jt)	<input type="text"/>
Business interests:	<input type="text"/>
Pensions: (1)	<input type="text"/>
(2)	<input type="text"/>
Motor cars & valuables:	<input type="text"/>
Cash and other:	<input type="text"/>





* Please return by email to familylaw@blakemorgan.co.uk so that one of our lawyers can contact you to help.



Offices in:

London
Cardiff
Reading
Oxford
Southampton

Contact us

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