

## RELATIONSHIP PROPERTY (SEPARATION)

### PARTIES

<b>OUR CLIENT</b> full name:	
<b>Other Information required:</b> Date of birth:	
Home address:	
Contact telephone numbers:	Work _____ Mobile _____ Home _____
Email address:	
Name of employer:	
Occupation:	

<b>OTHER PARTY</b> full name:	
Relationship to our client:	<b>spouse OR partner</b>
Name of solicitor acting:	
<b>Other information required:</b> Home address (if no solicitor acting):	
Email address (if no solicitor acting):	
Name of Employer:	
Occupation:	
Date of birth:	

### CHILDREN

Child 1 full name:	
Child 1 date of birth:	
Child 2 full name:	
Child 2 date of birth:	
Child 3 full name:	
Child 3 date of birth:	
Child 4 full name:	
Child 4 date of birth:	

### DATES

Relationship commencement date:	
Separation date:	
Date of marriage:	
Place of marriage:	

**FAMILY HOME**

Address and suburb:	
Town/city:	
Record of Title (search if necessary):	

**TRUSTS (check if Deeds held here)**

<b>Joint Trust - Name of Trust:</b>	
Joint Trust – date of Trust:	
Joint Trust – Trustee 1 full name:	
Joint Trust – Trustee 2 full name:	
Joint Trust – Trustee 3 full name:	
<b>Our client Trust - Name of Trust:</b>	
Our client Trust – date of Trust:	
Our client Trust – Trustee 1 full name:	
Our client Trust – Trustee 2 full name:	
Our client Trust – Trustee 3 full name:	
<b>Other party Trust - Name of Trust:</b>	
Other party Trust – date of Trust:	
Other party Trust – Trustee 1 full name:	
Other party Trust – Trustee 2 full name:	
Other party Trust – Trustee 3 full name:	

**OTHER INFORMATION REQUIRED**

**Arrangements for childcare**

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**Child Support**

Do you wish to make a claim for child support? YES / NO

    If yes, have you lodged an application with the IRD? YES / NO

Do you expect to make a claim for child support? YES / NO

    If yes, has the other party lodged an application with the IRD? YES / NO

**FAMILY HOME**

Address of property: \_\_\_\_\_

Owner(s) name: \_\_\_\_\_

Approximate value: \$ \_\_\_\_\_



Arrangements for payments of mortgage instalments, rates and insurance premiums pending settlement: \_\_\_\_\_

\_\_\_\_\_

Arrangements for occupation of the home: \_\_\_\_\_

Who will retain the home, or will it be sold? \_\_\_\_\_

\_\_\_\_\_

## **MORTGAGE(S) AND/OR LOAN(S)**

Mortgagor or Lender: \_\_\_\_\_

Approximate balance owing: \$ \_\_\_\_\_

Fixed or floating loan? \_\_\_\_\_

Any other lending against the home? \_\_\_\_\_

**Please provide printouts or statements showing the balance owing as at the date of separation**

**Is there an overdraft facility on these loans?** \_\_\_\_\_

## **OTHER REAL ESTATE**

Address of property: \_\_\_\_\_

Owner(s) name: \_\_\_\_\_

Approximate value: \$ \_\_\_\_\_

Mortgagor or Lender: \_\_\_\_\_

Approximate balance owing: \$ \_\_\_\_\_

Fixed or floating loan? \_\_\_\_\_

**Arrangements for payments of mortgage instalments, rates and insurance premiums pending settlement:** \_\_\_\_\_

\_\_\_\_\_

**Please provide printouts or statements showing the balance owing as at the date of separation**

## **BANK ACCOUNTS**

Name of bank	In whose name?	Account number	Approximate value \$

**Please provide printouts or statements of balances as at the date of separation**

## MOTOR VEHICLES

Vehicle description	Registered owner	Approx value \$	Loan owing over vehicle \$

Please provide market appraisals for each vehicle.

## FAMILY CHATTELS

Family chattels have been DIVIDED EQUALLY / BY AGREEMENT: YES / NO

List of specific major chattels/heirlooms/gifts	Who will retain	Approximate value \$

## LIFE INSURANCE POLICIES

Name of company	In whose name?	Policy No	Approximate value \$

## INCOME PROTECTION INSURANCE POLICIES

Name of company	In whose name?	Policy No	
			nil surrender value
			nil surrender value

**SUPERANNUATION POLICIES/KIWISAVER**

Name of company	In whose name?	Policy No	Approximate value \$

Please provide printouts of the balances as at **THE DATE YOUR RELATIONSHIP BEGAN AND AS AT THE DATE OF SEPARATION**

**BUSINESS OWNER(S)**

Name of business/company	Assets	Liabilities

Please provide a copy of the most recent financial statements.

**SHARES AND/OR OVERSEAS SHARES**

Name of company	In whose name?	Number of shares	Approximate value \$

Please provide documentary verification of shareholding.

**OTHER INVESTMENTS/ASSETS:**

eg vintage/racing cars (registered or unregistered), motorbike, caravan, timeshare, stamp/coin collection, jewellery, family heirlooms, money in overseas account(s), foreign cash/currency (eg funds held on cash passport), bitcoin, old traveller's cheques, antiques, forestry investment, money in Trade-Me account(s) or other on-line accounts, Maori land, livestock, loans to family members or money or other assets in hands of a third party

Asset	Reference / Location	Approximate value \$


**TRUSTS**

Please provide a copy of the Trust Deed and the latest financial statements (if any).

Do you or your former partner/spouse have an interest in a Trust? YES / NO

Name of Trust	Names of Trustees	IRD number

**LIABILITIES**

**CREDIT CARDS**

Name of company	In whose name?	Card number	Approx balance owing \$

Please provide printouts or statement showing the balance(s) as at the date of separation

**OTHER CREDIT CARDS**, eg GE Money, Farmers Card, Farmlands card, Warehouse Card, Q-Card, Fuel Card

Name of company	In whose name?	Card Number or Reference	Approx balance owing \$

Please provide printouts or statement showing the balance(s) as at the date of separation

**HIRE PURCHASE**

Name of company	In whose name?	Customer/Reference No	Approx balance owing \$


Please provide printouts or statement showing the balance as at the date of separation

**STUDENT LOANS**

Loan relating to which tertiary institution	In whose name?	Living costs	Course costs

Please provide statements showing the balance as at the date of separation and the breakdown of living costs and course costs

**POTENTIAL SEPARATE PROPERTY**

Have you or your partner ever inherited property or money? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you or your partner have an interest in a deceased person's estate? \_\_\_\_\_

\_\_\_\_\_

Assets disposed of since separation: \_\_\_\_\_

By you: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

By other party: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Assets acquired since separation: \_\_\_\_\_

By you: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

By other party: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**INCOME/CAPITAL – OUR CLIENT'S/OTHER PARTY'S**

What are your sources of income? \_\_\_\_\_



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Annual income: \$ \_\_\_\_\_

**What are the other party's sources of income?** \_\_\_\_\_

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Annual income: \$ \_\_\_\_\_

**Capital payments since separation eg debt reduction/payments to maintain property:** \_\_\_\_\_

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By you: \_\_\_\_\_

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By other party: \_\_\_\_\_

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**WILL** – do you wish to update your Will? \_\_\_\_\_

## **ECONOMIC DISPARITY**

In respect of the Section 15 claim, please prepare a narrative for me, covering the following issues:

1. Your employment history leading up the beginning of your relationship with your spouse/partner and your aspirations for your career development at that time.
2. The effect that your spouse's/partner's career had on your ability to progress your own career.
3. The effect of caring for the children and managing the household, on your ability to progress your career.
4. Any ways in which you can show that your spouse's/partner's career was enhanced by your commitment to your marriage/relationship, your children and his/her work.
5. Details of where you think your career would have taken you if you had not met your spouse/partner.
6. An assessment of where you will get to, in terms of career progression, between the date of your separation and your retirement.
7. Details of your on-going commitments to your children, from the date of separation to the time that they will become independent. Please also comment on how this will impact on your career advancement.
8. Specific reasons why your spouse's/partner's particular career has curtailed your own career advancement if applicable – eg time overseas or away from home etc will be very relevant to this issue.

## SPOUSAL MAINTENANCE

Please complete the following list of expenses:

<b>Particulars</b>	<b>Annually</b>	<b>Weekly</b>
Income tax	\$	\$
Insurance and superannuation	\$	\$
Medical and hospital benefits	\$	\$
Rent	\$	\$
Rates	\$	\$
Mortgage payments	\$	\$
Repairs on home	\$	\$
Food and household supplies	\$	\$
Electricity, gas and fuel	\$	\$
Telephone	\$	\$
Laundry and cleaning	\$	\$
Clothing	\$	\$
Child maintenance, care and education	\$	\$
Maintenance of former spouse	\$	\$
Entertainment	\$	\$
Fares	\$	\$
Car maintenance, running and registration	\$	\$
Hire purchase payment	\$	\$
Other expenses (please specify)		
<b>TOTAL:</b>	<b>\$</b>	<b>\$</b>