

Pre-nuptial Agreements (Binding Financial Agreements – BFA)

Before During and After Marriage

Instruction Form

For a Manual on Pre-nuptial agreements see the [Taxlawyers.com.au](http://Taxlawyers.com.au) web site.

Brett Davies Lawyers is a private law firm. We only take instructions via your Adviser, Accountant or Lawyer. You need to have your adviser contact us. We will then contact you to arrange a meeting with you.

During your initial consultation, we ask you a number of questions about you, your family and your personal circumstances. If you would like to keep the length of the appointment to a minimum, please feel free to complete all or part of this questionnaire and bring it to the meeting.

**A. Personal Details**

Marital Status (Please tick one)

<input type="checkbox"/>	Married on / /
<input type="checkbox"/>	Single – to be married on / / 2001
<input type="checkbox"/>	Defacto relationship since / /
<input type="checkbox"/>	Divorced on / /

**You**

**Your Partner**

Surname

(Family Name)

First name

Any Second name(s)

name(s)

Date of Birth

Occupation:

Postal Address

Same as home address; or

Home Phone #

Home Fax #

Mobile Phone #:

Work Phone

#: Work Fax #:

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Any assets in Alias  
Names or not in the  
above name(s)?  
(eg maiden name)

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## B. Your Assets

The big problem is Taxes like Capital Gains Tax and stamp duty. I would like to get an idea of your assets so that when I prepare your documents I tailor make them to suit your needs.

### 1. Your Family Home

Date of Purchase

/ / 19__ or 20 __
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Purchase Price

\$
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Estimated Current  
Market Value

\$
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How much is owing?

Mortgage Amount \$
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Have you ever run a business from home?

Yes  No

Have you ever claimed a deduction on running a business from  
your home?

Yes  No

Have you ever done renovations or capital improvements on the  
home?

Yes  No

### 2. Do you own your own business?

Trading Name:

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How much did you buy the business for?

\$

Assets (including goodwill)

\$

Saleable Value:

\$

What assets would you like the agreement to cover?

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What assets would you like the agreement not to cover?

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**3 Family Trusts**

Do you have a Family Trust or a Company?  Yes  No (Tick one)

Who is the appointer of the trust?

Who is the trustee of the trust?

**4. Do you own any other real estate?**

Owner(s)

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Suburb or street

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Date purchased

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Value at purchase date

\$
----

Value today

\$
----

Current mortgage

\$
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**5. Do you have Life Insurance (not in your Superannuation)?**

Nominated beneficiary?

Amount of Policy

	\$
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	\$
--	----

	\$
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**6. Superannuation**

Nominated beneficiary?

Your Name

Your current nominated beneficiary

Amount of Proceeds

**8. Do you own any shares?**

Fund Name or Name of Shares

Amount invested

In whose name held?

**9. Other Debts**

Apart from the debts above and your business trade debtors does  **Yes**  **No**  
anyone owe you any money?

Apart from the above do you owe any money?  **Yes**  **No**

Have you ever made a Will before?  **Yes**  **No**

Name & address of person  
holding the Will: