

**Barone Law Offices, PC**  
570 Williamson Road, Ste A  
 Mooresville, NC 28117  
Phone: 704-658-0592 Fax: 704-658-0366

**SEPARATION AGREEMENT AND PROPERTY SETTLEMENT WORKSHEET**  
**ATTORNEY FEE: \$1,000.00 minimum\* (\*depending on the complexity of the Agreement) + \$100.00 for the Memorandum and \$36.00 Recording Fee Pages 1-15 (\$4.00 each additional page 16+)**

1. Husband's Full Name: \_\_\_\_\_

Wife's Full Name: \_\_\_\_\_

2. Date of Marriage: \_\_\_\_\_

3. Date of Separation: \_\_\_\_\_

4. Children's Name(s), Date of Birth, & Present Ages:

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\_\_\_\_\_

5. Is there any real estate owned by one or both of you? If so, please list the address of such property and who will have possession of the property. (Please provide a copy of the deed(s) if possible)

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6. Make, Model, Year and VIN No. of all automobiles, boats, RVs and any other registered motorized vehicles to be kept by Husband:

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\_\_\_\_\_

Name of Bank(s), Credit or Financial Institute(s) that you owe for the vehicle(s), the Account Number(s) and Balance(s) owed, and Name Title Issued In:

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Make, Model, Year and VIN No. of all automobiles, boats, RVs and any other registered motorized vehicles to be kept by Wife:

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Name of Bank(s), Credit or Financial Institute(s) that you owe for the vehicle(s), the Account Number(s) and Balance(s) owed, and Name Title Issued In:

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7. Does each party have their items of clothing, personal jewelry, and articles of personal use in their possession? If not, list what items still need to be retrieved from the marital home?

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8. Employee Benefits Plan(s) – Account Number(s), Who the Plan(s) is with, Name of Plan(s), Owner (Husband or Wife):

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9. Bank Accounts – Name of Banks(s), Type of Account(s), Account No(s), Balances(s), Owner (Husband or Wife), and Who will have possession:

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10. Stocks or Mutual Funds – Description, Name Issued In, No. of Shares, Approximate Market Value Per Share, Approximate Total Market Value, Owner (Husband or Wife) and who will keep what shares:

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11. IRA's – Name of Bank(s), Account Number(s), Approximate Balance(s), and Owner (Husband or Wife):

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12. Life Insurance Policy(s) – Company Name(s), Policy Number(s), Amount(s), Kind (Whole Life, Term, Etc.), Owner (Husband or Wife):

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13. Do either of you own a business? If yes, Name of Business, Where Incorporated, Are either of you Office Holders in the Business?

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14. Have all household furnishings in the marital home been divided up to the mutual satisfaction of both parties? If not, list what furnishings still need to be retrieved from the marital home?

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15. Is there to be a distributive Award? (This is a lump sum of money that one spouse will pay to the other after separation):

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16. Debts of the Parties – Name of Creditor(s), Account Numbers(s), Balances(s), Who will assume each debt?

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17. Is there to be any support payment paid to one spouse by the other? If so, how much per month?

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18. Which spouse will have custody of the child or children?

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Which spouse will have visitation of the child or children, and how much visitation (Weekends, Thanksgiving & Spring Vacation, Christmas, Summer, Child's Birthday, Father & Mother's Day, Father & Mother's Birthday):

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19. Is there to be any child support payment paid to one spouse by the other? If so, how much per month, will it be paid through the clerk of court, will there be wage withholding? (Please provide wage information for both parties, in order for us to compute child support based on NC child Support Guidelines)

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20. Who will be responsible for providing hospital and medical insurance for the child or children? Who will be responsible for medical expenses for the child or children not covered by insurance?

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21. Does the child or children currently attend private school? If so, what is the name of the school? And who will be responsible for the financial support of private school and for how long?

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22. Which spouse will claim the dependency exemption on their tax return for the child/children?

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23. Who will be responsible for providing the financial support for college education for the child or children?

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24. Will the spouse who is providing child support maintain a life insurance policy for the benefit of the child or children? If so, how much after-tax benefits?

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25. Income Tax – will you file joint or separate federal tax returns for the current calendar year and subsequent years?

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If any deficiencies or refunds are assessed for any joint tax returns, how will these be split between the parties?

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26. Which party will be represented by me? Will the other party have counsel?

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