



ACCOUNTANTS, CONSULTANTS & BUSINESS VALUATORS

LICENSE / DEGREE VALUATION QUESTIONNAIRE

SECTION I - GENERAL INFORMATION	
Case Name	
Index Number	
Commencement Date of Divorce Action	
Date of Marriage	
Date Questionnaire Completed	
Questionnaire Completed By	

SECTION II - LICENSE / DEGREE HOLDER INFORMATION	
Sex	Male Female (Circle)
Race	
Date of Birth	
Indicate Plaintiff or Defendant	Plaintiff Defendant (Circle)

SECTION III - PLAINTIFF INFORMATION	
Name	
Address	
Home Phone	
Home Fax	
Business Phone	
Business Fax	
Cell Phone	
Email Address	



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LICENSE / DEGREE VALUATION QUESTIONNAIRE

SECTION IV - PLAINTIFF ATTORNEY INFORMATION	
Name	
Firm	
Address	
Phone	
Fax	
Cell Phone	
Email Address	

SECTION V - DEFENDANT INFORMATION	
Name	
Address	
Home Phone	
Home Fax	
Business Phone	
Business Fax	
Cell Phone	
Email Address	



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LICENSE / DEGREE VALUATION QUESTIONNAIRE

SECTION VI - DEFENDANT ATTORNEY INFORMATION	
Name	
Firm	
Address	
Phone	
Fax	
Cell Phone	
Email Address	

SECTION VII - LICENSE / DEGREE INFORMATION	
Description	
Date Earned	
Issuer	
Earned Entirely During Term of Marriage?	Yes No (Circle)
If not, Describe Credits Earned Both Before & After Marriage	
Do you have a Specialty? If so, please describe	
Required for Current Employment Position?	Yes No (Circle)
If yes, please explain	



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SECTION VIII - LICENSE / DEGREE HOLDER'S EDUCATION		
Please list all education beginning with High School regardless of whether or not a degree/license/certificate/or diploma was obtained		
Institutions Attended	Enrollment Period From / To	Degree Obtained & Course of Study
	From / / To / /	
	From / / To / /	
	From / / To / /	
	From / / To / /	
	From / / To / /	
	From / / To / /	



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SECTION IX - LICENSE / DEGREE HOLDER'S EMPLOYMENT HISTORY				
Employer	Position/Title	Employment Period	Duties/Responsibilities	Salary
		From / / To / /		Beginning Ending
		From / / To / /		Beginning Ending
		From / / To / /		Beginning Ending
		From / / To / /		Beginning Ending
		From / / To / /		Beginning Ending
		From / / To / /		Beginning Ending
		From / / To / /		Beginning Ending

SECTION X - LICENSE / DEGREE HOLDER'S SALARY HISTORY	
Annual Salary at Date of Marriage	\$
Annual Salary at Commencement Date of Divorce	\$
Current Annual Salary	\$
Base Annual Salary	\$
Bonus	\$
Date Bonus Received	
Date of Last Increase & Amount	



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SECTION XI - OTHER INFORMATION

1. Has your license/degree ever been valued? If so, please provide a copy of the valuation.
2. Do you receive any of the following: (Answer Y/N)
 - ___ Stock Options
 - ___ Use of an Automobile
 - ___ Employer Paid Credit Cards
 - ___ Pension Benefits
 - ___ Deferred Compensation
 - ___ Travel/Entertainment Allowances
3. If you receive any of the above, please describe what you are entitled to: _____

4. Are you a member of any professional organizations, honorary societies etc? If so, please describe

5. Do you have any special health problems, which may affect your employment? If so, please explain: _____

6. Describe any other information which you may deem useful to us in performing our evaluation: _____



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REQUIRED ATTACHMENTS WITH LICENSE / DEGREE QUESTIONNAIRE:

- Personal Tax Returns (federal form 1040) with corresponding W-2's for the five [5] years preceding the marriage and the five [5] years preceding the date of the commencement of the divorce action.
- Statement of Net Worth or Personal Financial Statement Prepared for Divorce Action
- Copy of License(s) / Degree(s)
- Employment Contracts both at the date of marriage and at the date of commencement of divorce action (if applicable)
- Most recent pay stub and any pay stub from date of commencement of divorce action
- If you own or control your own business, please supply the last five [5] years of partnership/corporate tax returns (all pages)
- Copies of all resumes or curriculum vitae

PLEASE RETURN THIS DOCUMENT COMPLETED WITHIN 7 DAYS OF RECEIPT WITH ALL REQUESTED ATTACHMENTS TO:

MARK S. GOTTLIEB, CPA, PC
98 CUTTER MILL ROAD, Suite 490 North
GREAT NECK, NY 11021