

The Client's Initial Information packet was created for the purpose of assisting you in your practice and to reduce your risk of being sued for legal malpractice. Users of these forms must review them carefully, adapt them to their own use, and update them to comply with changes in the relevant statutes, case law or rules.

A variation of the Client's Initial Information Packet, which includes a Social Security number authorization form (may not be necessary) and instructions for the client on how to engage a law firm, is available from the law office of Saucy & Saucy, P.C. as Form 4 in the 2016 OSB CLE "Handling Domestic Relations Cases." The Saucy variation of the Client's Initial Information Packet directs clients to the law firm's Website as a resource and omits the Uniform Support Declaration, which may or may not be necessary, but is always useful.

CLIENT'S INITIAL INFORMATION PACKET

Our attorneys want to represent you well. In our experience, this happens best when you are a vital member of our "team." Your part on the team is to provide us with information since there is nobody that knows more about this matter than you.

We will be asking you to provide us with lots of information and to perform several tasks. This is a difficult time for you; we do not intend to add further burdens. Not everything we request must be done at once. However, the sooner you provide us with the requested information, the sooner we can begin helping you.

Attached are the following:

1. Uniform Support Declaration;
2. List of possible monthly expenses;
3. Checklist of documents we need from you;
4. Release Authorization Form;
5. Suggested Guidelines for Parents During Separation or Divorce Proceedings;
6. Notice About Continuation of Health Coverage.
7. Notice of Statutory Restraining Order
8. Divorce in the Digital Age [Courtesy of Gevurtz, Menashe, Larson & Howe PC]

Please carefully read and follow the instructions contained in these materials. The Uniform Support Declaration (#1) and release authorizations (#4) should be completed and returned to us as soon as possible. You should also begin gathering the documents requested on the checklist (#3), and bring them in as soon as you can. Keep the other materials in your personal file. Always feel free to ask us any questions you have at any time during your divorce.

Remember, we cannot properly begin your case until we receive: [Modify as needed]

1. A written list, in order of priority, of what you want in this divorce.
2. The completed Uniform Support Declaration.
3. The signed release authorization.
4. The documents requested on the checklist.
5. [List any other required documents.]

We look forward to receiving the requested information and working with you on this case.

INSTRUCTIONS FOR COMPLETING UNIFORM SUPPORT DECLARATION

Enclosed with these materials is a uniform support declaration. The court will require both you and your spouse to file this form if support is being requested. When completed, it should give a clear picture of your income, current expenses, and financial need. *This could easily be the single most important document you complete during this divorce.* Take time to read these instructions thoroughly and complete the declaration with care.

Please complete this form in pencil and in as much detail as possible. You can estimate, but amounts should be realistic. You may not be able to complete every item. Some of the items will not be relevant to your situation. If there are any items not listed, please add them. If you come to a question which you might answer one way or another, include each possible answer, with a brief explanation.

If you do not have information on items such as car insurance, health and life insurance, taxes, baby-sitting and child care expenses, car payments, etc., please take the time to call and obtain estimates based on your being alone or with the children (if applicable). This is particularly important for a spouse who will have to purchase his or her own health insurance after the divorce is over because they were formally covered under a spouse's employer-sponsored insurance plan.

The USD asks several questions about health insurance that you may not know the answer to if the insurance is provided by your spouse. Let us know and we will help you with that portion of the form. It also asks about out-of-pocket medical expenses that occur monthly. Allergy shots, prescription medications, and physical therapy sessions are three examples of such recurring expenses.

Fill out the forms using your *actual* present expenses, separate from those of your spouse. Attach additional pages if you need more room to itemize your expenses. If child support is an issue, be particularly careful about completing the "children's portion" of item 1. It could have a direct bearing on the amount of child support awarded. Since this portion is sometimes difficult to complete, we have provided a sample page entitled "Possible Monthly Expenses" listing common expenses incurred by both adults and children.

The "food and household" item can be difficult to estimate. Include any expense that you might incur at your local store, other than clothing. Include items such as paper products, light bulbs, cleaning solutions, etc. Most people are surprised how large this expense can be.

If your actual expenses are unrealistically low because you are temporarily sharing living quarters or simply do not have enough money to meet your needs due to expenses associated with the divorce, explain this on an extra sheet and attach a statement listing what you believe your reasonable monthly expenses would be to maintain a standard of living similar to that which you enjoyed during the marriage or prior to commencement of these proceedings. Review your checkbook, bills, charge accounts, and other financial records for the past year or two to determine an average amount on specific items.

Many clients overlook the items on the attached page simply because there is no pre-designated box for them. Please review them to see if these expenses apply to your situation.

It is not uncommon for people to find they spend more than their income each month. Do not adjust your expenses to artificially alter such as result without first reviewing your draft with us.

Be sure to note that a number of documents need to be attached to the USD, including tax returns, pay stubs, and insurance and income papers. You should black out (redact) any personal information (*i.e.*, Social Security Number, Driver License Number, Personal Identification Number, etc.) that you do not want your spouse to see. Do not redact substantive information (*e.g.*, a line item on your pay stub that shows you make monthly donations to a charity your spouse does not know about). If you redact account numbers, such as your bank account, leave the last four digits of the account visible so I can identify each of the accounts easily. Please contact my office if you have specific questions about what you should or should not redact from your documents, but I want to be clear that you should not rely on my staff to redact that information for you.

Please feel free to call should you need further explanation regarding this declaration before we meet.

IMPORTANT NOTICES

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