

Businesses investments and retirement

Preparation for a lawyer consultation, not legal advice or a prenuptial or postnuptial agreement. Rules depend on the state and country. Work with a family-law attorney to draft and review your agreement; each partner should have independent counsel. This tool does not provide signing or guarantee enforceability.

For each asset:

Overview: one item per row. Add rows in Word as needed. Record values in their original currencies; this worksheet does not calculate totals.

Asset or interest	Owner	Value and currency	Valuation date and method

Details for one item: identify its row above. Copy this table for each additional item.

Field	Your notes
Asset type and owner	
Acquisition date and investment source	
Value and valuation method	
Transfer or sale restrictions	
Income and future contributions	
Partner’s contributions: funds, work, family care	

Field	Your notes
Debts and guarantees	
Other owners and agreements	
Supporting records	
Questions for counsel about appreciation, retirement rules, and taxes	

Do not independently decide retirement-right waivers or tax consequences. Specialist advice may be needed.

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