

ATTORNEY OR PARTY WITHOUT ATTORNEY ( <i>Name, State Bar number, and address</i> )  TELEPHONE NO.: _____ FAX NO. ( <i>Optional</i> ): _____ E-MAIL ADDRESS ( <i>Optional</i> ): _____ ATTORNEY FOR ( <i>Name</i> ): _____	<b>FOR COURT USE ONLY</b>
<b>SUPERIOR COURT OF CALIFORNIA, ALAMEDA COUNTY</b>  STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
PETITIONER/PLAINTIFF: RESPONDENT/DEFENDANT: OTHER:	
<b>CASE MANAGEMENT CONFERENCE QUESTIONNAIRE for</b> <input type="checkbox"/> <b>Continued Family Law Status Conference</b> <input type="checkbox"/> <b>Family Centered Case Resolution Conference</b>	CASE NUMBER: _____

1. Statistical Information

- a. Date of marriage:
- b. Date of separation:  
 If disputed:      Petitioner's proposed date: \_\_\_\_\_      Respondent's proposed date: \_\_\_\_\_
- c. Date petition filed:
- d. Date of service:

2. Child Custody/Child Visitation  Not applicable

- a. Are there current custody/visitation orders?  YES  NO  
 If yes:    Date of current order: \_\_\_\_\_  
             Brief description of orders (e.g., alt weeks, 2-2-5, supervised): \_\_\_\_\_  
             Time share for Petitioner \_\_\_\_\_ % and for Respondent \_\_\_\_\_ %  
 If no:      Is a custody/visitation order requested?  YES  NO  
             Does either party request a change in the current order?  YES  NO
- b. Do the parties require a referral to Family & Children's Bureau?  YES  NO
- c. Is it anticipated that a custody evaluation will be required?  YES  NO

3. Child Support  Not applicable

- a. Is there a current child support order?  YES  NO  
 If yes, date of current order: \_\_\_\_\_ amount ordered: \$ \_\_\_\_\_ per month
- b. Is either party seeking a child support award?  YES  NO
- c. What is the date of filing of each party's most current income and expense declaration?  
 Petitioner: \_\_\_\_\_, 20\_\_\_\_; Respondent: \_\_\_\_\_, 20\_\_\_\_.
- d. Is either party seeking to modify the current child support order?  YES  NO  
 If yes, brief description of the reason for modification: \_\_\_\_\_
- e. Is either party claiming child support arrearages or over-payment?  YES  NO  
 If yes, amount claimed to be owed: \$ \_\_\_\_\_ amount claimed overpaid: \$ \_\_\_\_\_

4. Spousal Support

- a. Is there a current spousal support order?  YES  NO  
 If yes, date of current order: \_\_\_\_\_ amount ordered \$ \_\_\_\_\_ per month
- b. Is either party seeking an award of spousal support?  YES  NO  
 If yes, amount requested: \$ \_\_\_\_\_
- c. Is either party seeking to modify the current order or terminate the court's jurisdiction over spousal support?  
 YES  NO. If yes, proposed modification/reason for termination: \_\_\_\_\_

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RESPONDENT/DEFENDANT:	

d. Is either party claiming spousal support arrearages/over-payment?  YES  NO  
 If yes, amount claimed to be owed: \$ \_\_\_\_\_ amount claimed overpaid: \$ \_\_\_\_\_

5. Property

a. Do the parties have any community property to divide?  YES  NO  
 If yes: Real property \_\_\_\_\_ FMV \_\_\_\_\_ Debt \_\_\_\_\_  
 Pensions \_\_\_\_\_  
 Stock/stock options \_\_\_\_\_  
 Vehicles \_\_\_\_\_  
 Gold/jewelry \_\_\_\_\_  
 Other property valued above \$5,000.00 \_\_\_\_\_

b. Are there community debts?  YES  NO  
 If yes: Credit card debt \_\_\_\_\_  
 Student loans \_\_\_\_\_  
 Tax liabilities \_\_\_\_\_  
 Promissory notes \_\_\_\_\_  
 Other debts exceeding \$1,000.00 \_\_\_\_\_

c. Have real property appraisals been completed?  YES  NO

d. Have pensions been joined?  YES  NO

e. Is there a dispute over the valuation date of any asset?  YES  NO

f. Does either party claim any significant separate property assets?  YES  NO  
 If yes, state the nature and extent of said assets:

g. Is either party requesting reimbursement for payments made on community debt or use of community property?  
 YES  NO Amount requested \_\_\_\_\_

6. Discovery

a. Discovery remaining:  Interrogatories  Depositions  Document production

b. Estimated date of completion:

c. Are experts retained or expected to be retained?  YES  NO

If yes, what is the nature of the expertise of the expert(s)?

- Child custody evaluator       Real estate appraiser       Accountant  
 Business valuator       Vocational evaluator       Other (specify):

Are or will the retained or expected experts be appointed under Evidence Code section 730?  YES  NO

d. Other discovery to be undertaken (specify):

7. Mandatory Declaration of Disclosure (for dissolution, legal separation, and nullity cases only)

a. Petitioner has served respondent with  preliminary  final declaration of disclosure

b. Respondent has served petitioner with  preliminary  final declaration of disclosure

8.  Party intends to request bifurcation of the following issue(s) (specify):

9.  Parties or counsel have met to discuss settlement.  YES  NO  
 How many times in person (specify): \_\_\_\_\_ by phone (specify): \_\_\_\_\_

10. Estimated time for trial (specify hours or days):

11. Non-expert witnesses (number): \_\_\_\_\_ (names): \_\_\_\_\_

12. Expert witnesses (number): \_\_\_\_\_ (names): \_\_\_\_\_

13. Please attach all case management orders you request be made.

Date: \_\_\_\_\_

ATTORNEY FOR  PETITIONER  RESPONDENT  OTHER