**FINANCIAL DISCLOSER**

## CASE NO.: BRANCH:

|  |  |  |  |
| --- | --- | --- | --- |
| Your Name Address | (Your Attorney) |  | (Other Party’s Attorney) |
| DOB |  |  |  |
| Employer |  |  |  |
| Occupation |  |  |  |
| Date of Marriage |  | Date of Separation |  |

Please list your children and their dates of birth:

|  |  |
| --- | --- |
| Children | Birthdate |
|  |  |
|  |  |
|  |  |
|  |  |

# STATEMENT OF INCOME

## TAX INFORMATION

|  |  |
| --- | --- |
| Last year’s federal tax refund: Husband/ father  Wife/ mother  Joint | $ |
| $ |
| $ |
| Last year’s state tax refund: Husband/ father  Wife/ mother  Joint | $ |
| $ |
| $ |

**MONTHLY INCOME**

|  |  |
| --- | --- |
| Your monthly gross income from salary, commissions, allowances, and overtime. (Note: To arrive at monthly income, multiply weekly income by 52 and divide by 12; multiply bi-weekly income by 26 and divide by 12) | $ |
| Pensions and retirements | $ |
| Social Security benefits | $ |
| Disability and/or Unemployment Compensation Benefits | $ |
| Public assistance (i.e., welfare, W-2 payments, food stamps, daycare subsidy) | $ |
| Prior court-ordered support received | $ |

|  |
| --- |
| Dividends and interest $ |
| Rents received $ |
| \*Bonuses (annual, semi-annual or quarterly) $ |
| All other sources $ |
| **TOTAL MONTHLY INCOME** $ |

**DEDUCTIONS FROM YOUR GROSS MONTHLY INCOME**

|  |  |
| --- | --- |
| Number of tax exemptions claimed for payroll deductions: Husband/ father  Wife/ mother |  |
| Federal income taxes | $ |
| State income taxes | $ |
| Social security and Medicare | $ |
| Medical insurance | $ |
| Other insurance - dental, long term health insurance | $ |
| Support paid by payroll deduction | $ |
| Union or other dues | $ |
| Retirement or pension fund | $ |
| Savings plan | $ |
| Credit union, debt repayment | $ |
| Other (specify): | $ |
| **TOTAL MONTHLY DEDUCTIONS** | $ |
| **NET MONTHLY INCOME** (aka **TAKE HOME PAY**; subtract deductions from the monthly income) | $ |
| **GROSS MONTHLY INCOME OF OTHER HOUSEHOLD ADULT MEMBERS** | $ |

1. **STATEMENT OF MONTHLY ESTIMATED EXPENSES**

Specify the number of members in each household whose expenses are included. List their names and relationships. #

|  |  |
| --- | --- |
| **Relationship** | **Name** |
| Husband |  |
| Wife |  |
|  |  |
|  |  |

## MONTHLY ESTIMATED EXPENSES

|  |  |  |
| --- | --- | --- |
| Rent or mortgage payments, principal, interest, taxes, insurance (if in one payment) |  | $ |
| Real estate taxes and insurance (Insurance $ / year ; Taxes $ / year) | Annual | $ |
| Repairs/ maintenance of residence, appliances, furnishings, garbage pick-up |  | $ |
| Food (include work/ school lunches, household supplies, tobacco, wine and spirits) |  | $ |
| Electricity and gas |  | $ |
| Heat |  | $ |

|  |  |
| --- | --- |
| Water | $ |
| Telephone, cable, interent | $ |
| Laundry/ dry cleaning | $ |
| Clothing and shoes | $ |
| Medical/ drug expenses not covered by insurance | $ |
| Dental expenses not covered by insurance | $ |
| Insurance (life, health, accident, comprehensive, liability, disability - exclude payroll deductions) | $ |
| Childcare (including babysitting/ daycare) | $ |
| Prior court ordered child support payments | $ |
| School (both child/ adult education, lessons) | $ |
| Entertainment (clubs, social obligations, travel, vacations, camp, recreation, hobbies) | $ |
| Incidentals (grooming, gifts, holiday gifts, birthday, donations) | $ |
| Transportation, auto expenses (gas, oil, repair, parking, auto insurance, etc.) | $ |
| Vehicle payments | $ |
| Newspapers, periodicals, books | $ |
| Memberships (associations, clubs, religious organizations) | $ |
| Care/ maintenance of pets | $ |
| Payments for support of dependents not living at home (not included above) | $ |
| Installment payments/ debt payments | $ |
| Other expenses: | $ |
| **TOTAL ESTIMATED MONTLY EXPENSES** | $ |

1. **DEBITS AND OBLIGATIONS (Attach schedule if necessary)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Creditor’s Name** | **For** | **Balance** | **Monthly Payment** |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |

1. **STATEMENT OF ASSETS**

|  |  |  |
| --- | --- | --- |
| All property of the parties known to be owned individually or jointly; indicate who holds title or how title is held, (M) Man, (W) Woman,  (J) Jointly, or (C ) for the benefit of the Children. Further, if there are any assets owned by either party prior to the marriage or inherited or received as a gift prior to or during the course of the marriage, also identify the asset or assets as follows: (P) Prior to the marriage,  (I) Inherited, (G) Gifted. For example: property gifted to man (G-M). If insuﬃcient space, insert total and attach schedule. | | |
| **Prior to** | **Who holds** | **Asset** |
| **marriage,** | **the title (M,** |  |
| **inherited, or** | **W, J, or C)** |  |
| **gifted (P, I, or** |  |  |
| **G)** |  |  |

|  |  |  |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

* 1. **REAL ESTATE** (If more real estate is owned, attach with same information for all additional properties.)

|  |  |  |  |
| --- | --- | --- | --- |
| Type of property: | | Original cost: | $ |
| Address: | | Cost of additions: | $ |
| Total cost | $ |
| Date of purchase: | | Mortgage balance: | $ |
| Current market value: | $ | Other liens: | $ |
| Basis/ date of valuation: | | Equity: | $ |
| Monthly payment: | $ | Taxes (Previous tax year than current year): | $ |

* 1. **PROFIT SHARING / PENSION / RETIREMENT ACCOUNTS** (Include deferred compensation plan, Keogh plan and IRA accounts, employee stock option plans, stock options)

|  |  |
| --- | --- |
| **Name of account** | **Amount** |
|  | $ |
|  | $ |
|  | $ |

* 1. **CASH AND DEPOSIT ACCOUNTS** (Include all accounts at banks, savings & loans, credit unions, savings, checking, and certificates of deposit)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Name of Institution** | **Type of Account** | **Holder** | **Balance** |
|  |  |  |  | $ |
|  |  |  |  | $ |
|  |  |  |  | $ |
|  |  |  |  | $ |

## STOCKS AND BONDS

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Number of shares** | **Name of Company/ Issuer** | **Value** |
|  |  |  | $ |
|  |  |  | $ |
|  |  |  | $ |
|  |  |  | $ |

* 1. **AUTOMOBILES**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Year** | **Make** | **Current Value** | **Amount of Lien** | **Net Value** |
|  |  | $ | $ | $ |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  | $ | $ | $ |
|  |  | $ | $ | $ |

* 1. **MEDICAL, CASUALTY, DISABILITY, OTHR INSURANCE** (not paid through unemployment)

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of company** | **Policy Number** | **Group number** | **Type** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## LIFE INSURANCE

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of company** | **Beneficiary** | **Face Amount** | **Surrender Value** |
|  |  | $ | $ |
|  |  | $ | $ |
|  |  | $ | $ |

* 1. **BUSINESS INTEREST** (Indicate name)

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Share** | **Type of Business** | **Value Less Indebtedness** |
|  |  |  | $ |
|  |  |  | $ |

* 1. **OTHER PERSONAL PROPERTY AND ASSETS** (Value exceeds $1000 - i.e., antiques, heirlooms, china, furs, silver, art objects, coin collections, boats, snowmobiles, guns, etc.)

|  |
| --- |
|  |
|  |
|  |

* 1. **DISPOSED ASSETS** Have you disposed of any assets within the one-year period prior to the filing of the petition for divorce, the proceeds of which are not already accounted for in the above representation of assets?

|  |  |  |  |
| --- | --- | --- | --- |
| No | | | |
| Yes (If yes, describe the asset, date of transfer, to whom transferred and the value received, if any) | | | |
| **Date of Transfer** | **Asset** | **Whom transferred** | **Value Received** |
|  |  |  | $ |
|  |  |  | $ |

* 1. **GIFTS OR INHERITANCES** List and describe any property valued over $500 that you acquired as inheritance or gift (not from your spouse), including when and how acquired, fair market value at time acquired and at present, and how much such property is currently held.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **When acquired** | **Type of property** | **How acquired** | **How property is currently held** | **Fair Market Value when acquired** | **Fair Market Value now** |
|  |  |  |  | $ | $ |
|  |  |  |  | $ | $ |
|  |  |  |  | $ | $ |

* 1. **PROPERTY OWNED PRIOR TO MARRIAGE** List and describe any properly valued over $500 and not acquired by gift or inheritance that you owned prior to the marriage, including fair market value at time of marriage and present, and how the property is currently held.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Type of property** | **How acquired** | **How property is currently held** | **Fair Market Value when acquired** | **Fair Market Value now** |
|  |  |  | $ | $ |
|  |  |  | $ | $ |
|  |  |  | $ | $ |

## Are you a party of any other lawsuits?

|  |
| --- |
| No |
| Yes (If yes, provide details: attach separate sheet if necessary) |

* 1. **Have you ever filed bankruptcy?**

|  |
| --- |
| No |
| Yes (If yes, provide details: attach separate sheet if necessary) |

Failure by either party to timely file a complete disclosure statement shall authorize the court to accept the statement of the other party as accurate.

I declare, under penalty of perjury, that the foregoing, including any attachments, is true and correct and that this declaration was executed on this day of , 20 .

X